Missouri First Steps Training Manual

Child Care Management

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Missouri First Steps Training Manual

Overview

Welcome to the Missouri First Steps Training Manual. The purpose of this manual is to provide you with a powerful training tool that can be used to gain an understanding of the Child Care Management module of the Missouri First Steps web application. This manual has been compiled from the How Do I help topics included as part of the Missouri First Steps online help system. Each of these topics includes a step-by-step exercise that walks you through a specified task. And, because this manual is compiled from help topics included in the Missouri First Steps web application, you can access the appropriate exercises online whenever you are using the application.

The exercises included in this manual will show users how to view, create and update information within various parts of the Child Care Management module of the Missouri First Steps web application. This manual is intended to help users gain a general understanding of the application, yet it is not a compilation of all the tasks that can be performed within the application. To view a list of all tasks that can be performed, access the online help function and click the How Do I button.

As you can see, this manual is an excellent resource for learning the processes and procedures that you'll be using every day. The manual is divided into a few distinct areas. Take a minute to look at the Table of Contents and flip through the manual to familiarize yourself with the information it holds so that the next time you need a piece of information quickly, you'll know where to find it.

Getting Started

Navigating Help

Within the help system, navigation buttons are displayed in the panel along the top of the web page. The following list describes each of the navigation buttons:

- Click the **Contents** button to access the help system's table of contents.
- Click the **Index** button to access the help system's index.
- Click the **Search** button to access the help system's search function.
- Click the **Glossary** button to access the help system's glossary of terms.
- Click the **How Do I** button display a list of all How Do I topics within the help system.

The Contents, Index, Search, and Glossary functions are displayed in a pane on the left-hand side of the help system web page. The How Do I List is the only exception--it is displayed in this pane on the right-hand side of the web page.

To navigate to a previously displayed help topic click the web browser's **Back** button. For more information on navigating web pages, refer to your web browser's help file.

To print the currently displayed help topic, click the web browser's **Print** button. For more information on printing web pages, refer to your browser's help file.

Find a Help Topic

Use this exercise to find a help topic quickly and easily within the help system. There are four unique ways of locating a help topic. Use the method that you find most useful.

Complete the following steps to find a help topic using the table of contents:

1. Click the 📖 **Contents** button to display the help system's table of contents panel on the left-hand side of the web page.

2. Browse through the help topics, displayed by category.

3. Click a book 📘 to display the help topics it contains.

4. Click a page [?] to display a selected help topic.

Complete the following steps to find a help topic using the index:

1. Click the ✎ **Index** button to display the help system's index panel on the left-hand side of the web page.

2. Browse through the keywords, listed alphabetically. *OR* Type a keyword or phrase in the text box to highlight a specific help topic.

3. Click a keyword in the index to display the help topic.

Complete the following steps to find a help topic using the search:

1. Click the ✎ **Search** button to display the help system's search panel on the left-hand side of the web page.

2. Type a keyword or phrase in the text box.

3. Click the [→ GO] button to begin the search.

4. Browse through the list of returned topics, sorted alphabetically.

5. Click a topic in the list to display a selected help topic.

Complete the following steps to find a How Do I help topic using the How Do I List:

1. Click the **How Do I** button to display the help system's *How Do I List* on this side of the web page.

2. Browse through the list of topics, displayed alphabetically.

3. Click a topic in the list to display the selected help topic.

> **Note:** When you have found the help topic you were looking for using one of the methods listed above, you can click on the button to hide the left-hand panel. This is displayed if using Microsoft Internet Explorer. Closing this frame is not allowed in Netscape.

Data Access Overview

Understanding User Roles

The five main roles utilized by the Child Care Management (CCM) Security System are as follows:

- **Case Administrator** – Assigned to specific Admin Locations
- **Intake Coordinator** – Assigned to specific Admin Locations and assigned to Child Records as of current date
- **Service Coordinator** – Assigned to specific Child Records as of current date
- **IFSP Team Member** – Assigned to specific Child Records as an active IFSP Team Member as of current date
- **Service Providers** – Assigned to specific Child Records via active authorization as of current date

Note: Each user who is enrolled to access the CCM system is assigned a role. The role assigned to the user determines which child records and pages the user will have access to within the web-based system. The role assigned to the user works in combination with the E.I. Status of the child's records, the child's Enrollment status and Admin Location of each child's record.

Early Intervention Child Record Status

The Early Intervention (E.I.) Status represents where the child's record is in the First Step's program process. The child record statuses defined are Referral, Initial Parental Consent, Eligibility and IFSP.

- Referral indicates the child was referred to the program, the referral was accepted by the location and a new child's record was established. The record remains in referral status until the parents either approve or decline participation of their child in the First Steps program.
- Initial Parental Consent indicates the family was contacted, Intake information was gathered and the family has consented to proceed with First Steps eligibility determination. The record remains in this status until the child's program eligibility is determined.
- Eligibility status indicates the child has been found eligible for the First Steps program. The child remains in the eligible status until the initial Individualized Family Service Plan (IFSP) Team Meeting is finalized.
- IFSP status indicates that the initial IFSP meeting was held and finalized. Team Meeting indicators display the current meeting status.
- Enrollment Ended status indicates the child's enrollment period was ended and the child is no longer an active participant in the program.

CCM User Security Overview

The security for the CCM system combines the child's E.I. Status with the Role assigned to the user. Some users may have multiple roles. Depending on the child's E.I. Status as of the current date; at different times one role may override another role.

An example of this will be those users who are Family Service Coordinators. The security account for those users will have both the role of Intake Coordinator and Service Coordinator assigned to them. The user will be assigned to the child's record as both the Intake and Service Coordinator. The role of Intake will allow the user to access the child's record from the time they are assigned at referral (Referral Status) until the Initial IFSP meeting is finalized (IFSP Status). At IFSP Status the user will access the child's record as the assigned Service Coordinator until the child's enrollment is ended or until another Service Coordinator is assigned. The role transition will be transparent to the user.

Page and Program Edits

Edit types found in the system are either page or program edits. Each web page contains data entry fields, and the data elements that are to be saved by the CCM system. The users of the system gather and enter data as it is acquired, in any order they choose.

If a required field on a page is left blank and the user saves the record, an error message is displayed informing the user of the error. This is known as a Page edit. Page edits are for those fields that are required by the system to store a new or updated record to the database.

Once the user has entered the child's information and wants to move the child's record to the next E.I. Status, and then the user may select to run the Program Edits. Program Edits are run by the system at the time specified by the user. Program Edits are run to check the child's record for data elements required by program compliance. Errors found on the child record are displayed on a data edit error page. The bottom of the page contains a list of the error and a link for the user to access the page and correct the error. When corrections are completed, the user may re-run the program edits and the child's status is updated to the next level, once the edits are passed successfully.

Tab and Page Access

Each child's record contains main tabs, which allow access to pages or sub tabs associated with the main tab. Main tab and specific page access is allowed to different users at varied points in time on each child's record. There are times when a page will be view only vs. a page that can be updated or modified. The main tabs allow access to functions within the system.

The main tabs for Child Care Management are displayed below.

The main tabs accessible to the user are based on the child's E.I. Status and the role assigned to the user.

Early Intervention (E.I.) Status

The Early Intervention (E.I.) Status reflects what process the child's record is currently in. The illustration below demonstrates a single child who is referred and remains in the program until age three. Once the child reaches the IFSP status, the record remains in E.I. Status until the current enrollment period ends.
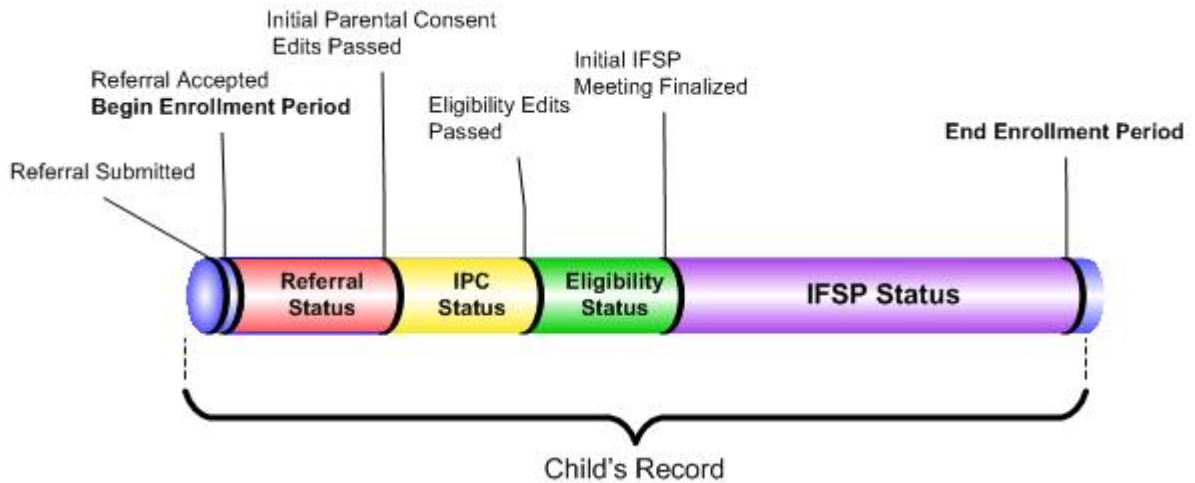
Children that enter and exit the program more than once will maintain the same record, but the record will contain multiple enrollment periods. When an enrollment period ends, a "new" referral is required to start the new enrollment period. The child's E.I. Status will begin with each enrollment period. The E.I. Status will progress as before, as the record passes the program edits. This is demonstrated in the following illustration:
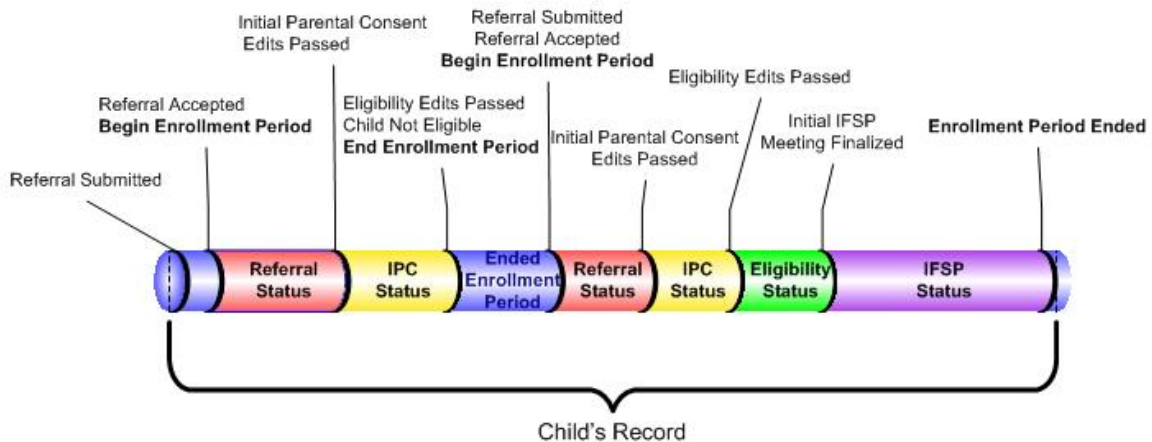
Referral Status

Access to the main tabs contained in the child's record and how they correlate to the E.I. Status and the user's system-assigned role are explained in this section. The examples contains the role of the user who may access the record and the main tabs that are available to the user at a specific point in time based on the child's E. I. Status.

When a child is initially referred and accepted into the system, the record is considered in Referral Status. While the child's record is in referral status the Case Administrator and the Intake Coordinator have write access to the child's record. The Intake Coordinator must be assigned to the child's record. The child' record is assigned to the Admin Location for the Case Administrator.
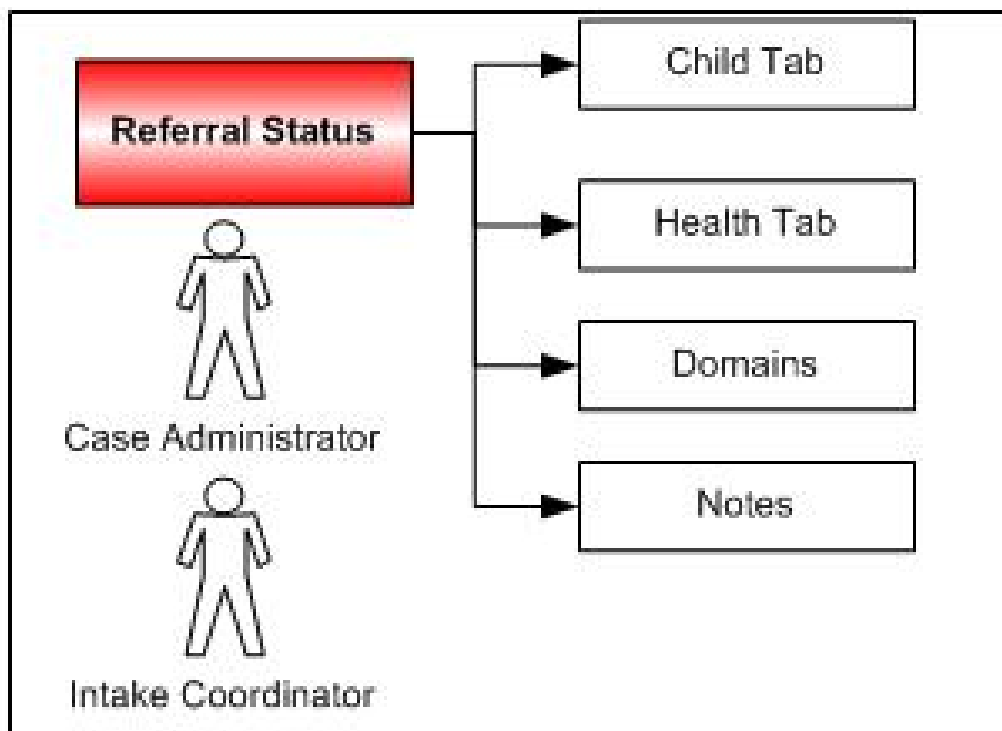
Initial Parental Consent (IPC) Status

When the Initial Parental Consent (IPC) edits have been passed, the child's record moves from Referral Status to IPC Status. While in IPC status, the Case Administrator for the child's records assigned to the admin location and the assigned Intake Coordinator have write access to the child's record. The Eligibility main tab is now available.
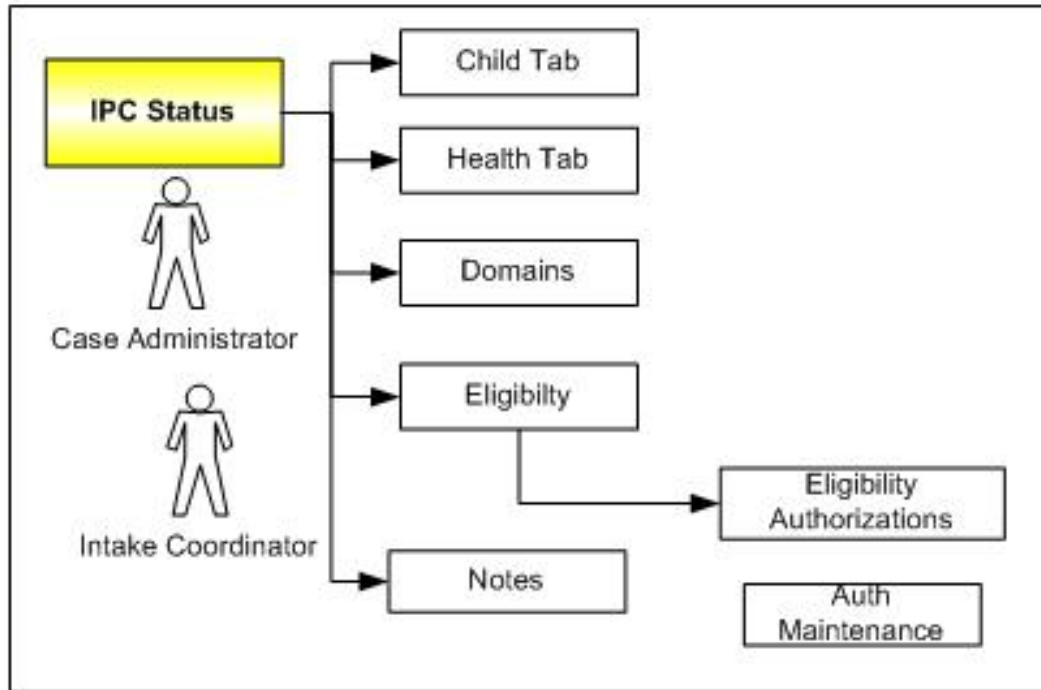
Eligibility Status

If the child is determined eligible, the Case Administrator and Intake coordinator assigned to the child's record have write access to the child's record. Team Meetings and IFSP main tabs are now available to the Case Administrator and Intake Coordinator users.
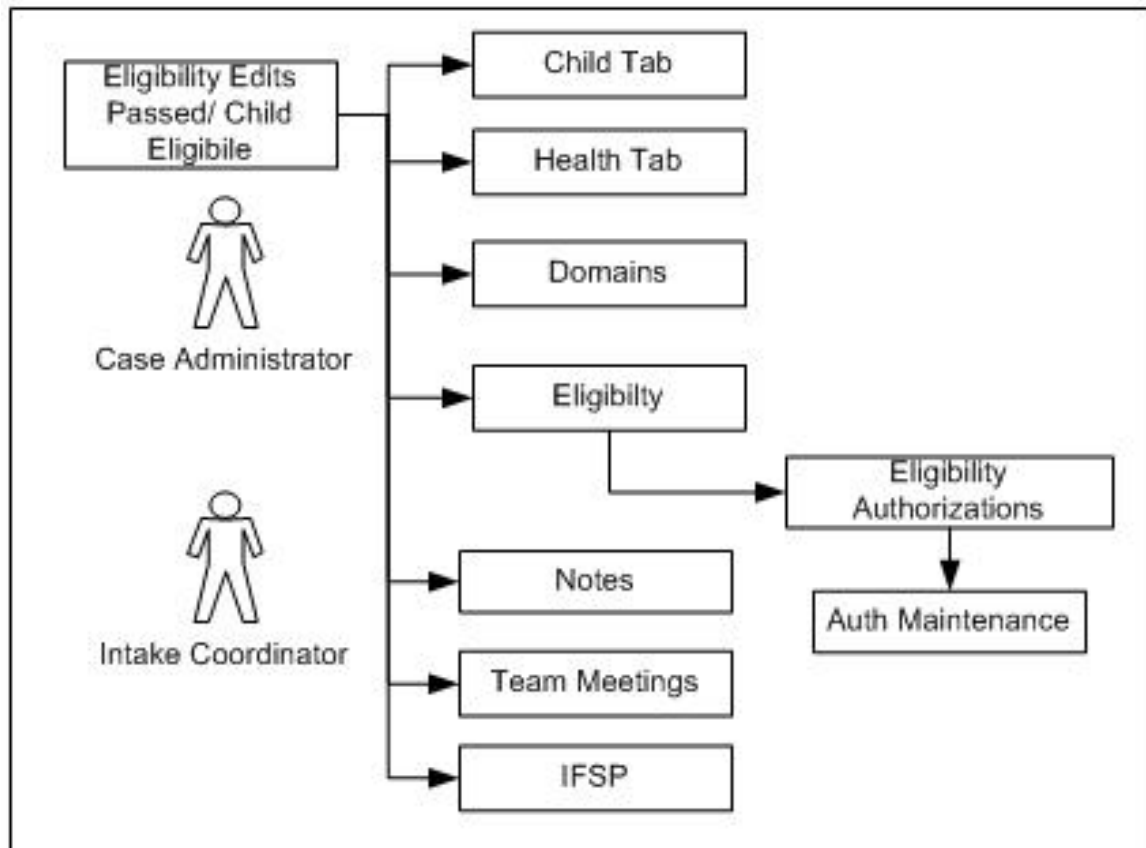
IFSP Status

IFSP Status indicates that the Initial IFSP team meeting is finalized (completed). The child remains in the IFSP status until the child's enrollment is ended. The Service Coordinator has write access to the child's record. Service Providers may view the IFSP information, the Child Detail Page and enter Provider Progress Notes as longs as they have active authorizations on the child's record. Active IFSP team members may view the IFSP data and the Child's Detail page.
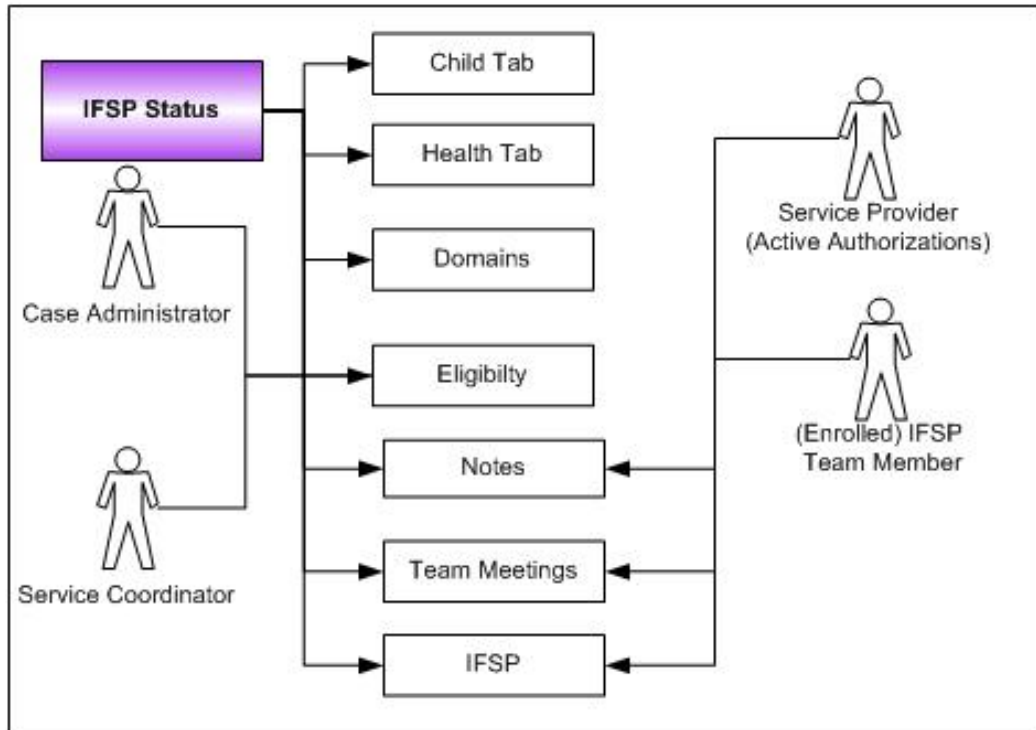
Ended Enrollment

Once the Enrollment period has ended, the Case Administrator is the only user allowed access to the child's record. The Service coordinator assigned to the child's record when the enrollment was ended is allowed access up to 90 days.
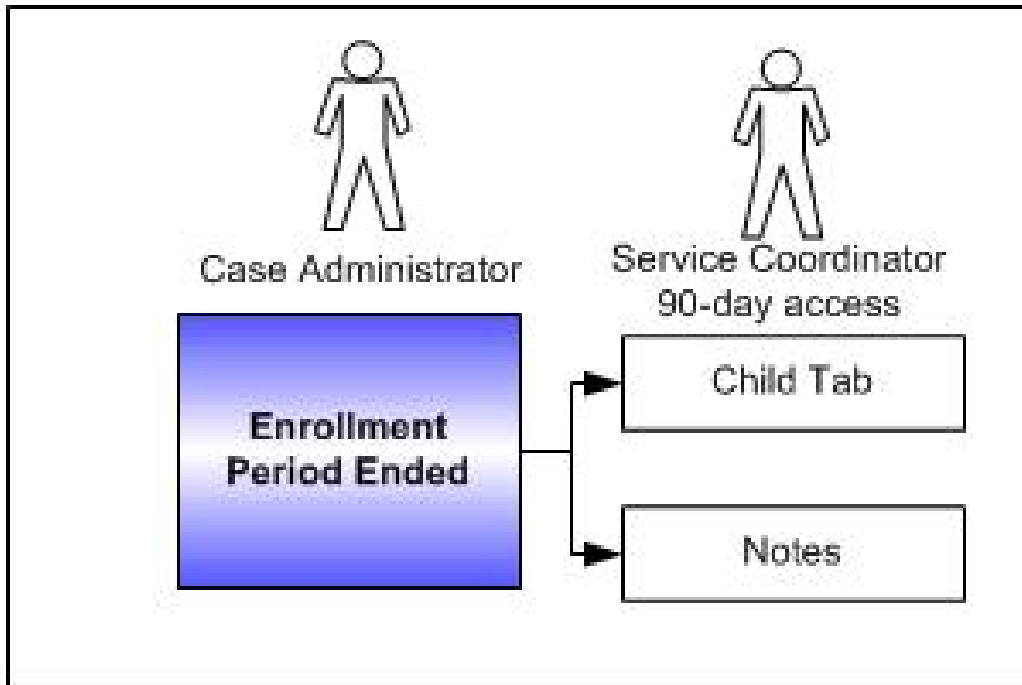
The Home Page

Each user logged into the system will have a corresponding Home page that contains lists of child data based on their user information. The "list" links only display if pertinent child records were found for the user. Below is an example view of the Home page.

Tip: The image above depicts "total" and "possible" records. Total indicates that only one count of the records exists. Possible indicates that there are XX (number of) possible records in either list, and that there are two or more filtered lists that contain counts to help you get an exact count.

If a list item does not contain any child records, the list link is not displayed to the user. Items displayed in red are higher priority list items. The user may select the list link and the list details are displayed.

Possible list data may include the following:

- Children Exceeding 45-days Referral
- Meetings Over due but not scheduled
- Children Transferred/Needing Assignment
- Child Records Needing Update
- Eligibility Edits Required
- Team meeting Finalization Required
- Parental Consent Edits Required
- Case Note Follow-Up
- Progress Notes Pending Review
- My E.I. Kids
- Children In 45-Day Referral
- Children Needing Enrollments Ended
- Upcoming Meetings Scheduled
- Meetings Scheduled but Not Ongoing

The Child Care Management Menu

Location Administration – This menu option accesses a sub-menu that contains the Lapsed ISFP sub-menu option. This menu option is available only for those users with the role of Case Administrator.

Referral – This menu option accesses a sub-menu that contains the New Referral (Internal) and the Referral Processing options. These sub-menu options are available to the Case Administrators and Intake Coordinators.

Search – This menu option accesses a sub-menu that contains the three search options available to the user, Child, Provider, and Unattached Referrals. Most users will have the Child search sub-menu option available. The Unattached Referrals sub-menu option is only available for Intake Coordinator and Case Administrator roles.

Search

Search for a Child's Record

Use this exercise to search for a child's record within the database.

Complete the following steps to finish this exercise:

1. On the **Child Care Management** pull-down menu, select the **Search** menu option. A sub-menu displays.

2. Select the **Child** sub-menu option. The Child Search page displays.

Tip: Some of the fields on the Child Search page allow the entry of partial information to help you narrow your search.

3. Select the appropriate radio button and enter filter criteria in the following fields as necessary to perform a search:

   - Child ID (a complete child ID number must be entered)

   - Last Name (a minimum of 2 characters must be entered to perform a search by last name)

   - First Name (a search cannot be performed by entering only a child's first name)

4. Click **Search** to perform a search based on the specified filter criteria. The Child List page displays.

Tip: Under **Search Filter**, Case Administrators can clear the **Show Active Only** check box to display both active and inactive child records in the **Child List** table. This option is only available only for Case Administrators. Selecting the **Statewide** check box displays statewide child records (that match the search criteria entered) in addition to local child records. When the **Statewide** option *is* *not* selected, the list contains child records for the current admin location only. When the **Statewide** option *is* selected, the list displays all other records that matched the filter criteria and excludes those records for the current admin location. The **Detail** link is available for statewide records. When either check box is selected or cleared, the information displayed in the **Child List** table is refreshed.

5. In the columns of the **Child List** table, view the following information for each child record displayed:

- Detail (click the 🔍 icon to display detailed child information)
- Last Name
- First Name
- Child ID
- DOB
- Gender
- Status
- County
- Location Description
- Referral Date

> 🔍**Tip:** You can change how the information in the **Child List** table is sorted and displayed by clicking on the column headings. You can click the 🔍 icon in the **Detail** column to view detailed child information. The Child Detail page displays when clicked.

Search for a Provider's Record

Use this page to perform a search and filter the list of providers that display on the Provider List page.

Complete the following steps to finish this exercise:

1. On the **Child Care Management** pull-down menu, select the **Search** menu option. A sub-menu displays.

2. Select the **Provider** sub-menu option. The Search Provider page displays.

Tip: Some of the fields on the Search Provider page allow the entry of partial information to help you narrow your search.

3. Enter or select information in one or more of the following fields to perform a search:

- Provider ID (a complete provider ID number must be entered)

- Provider Last Name (a minimum of 2 characters must be entered to perform a search by last name)

- Provider First Name

- Billing Entity Name (a minimum of 2 characters must be entered to perform a search by billing entity name)

- Zip

- County (selected by County Search)

- Specialty

4. Click **Search** to perform a search based on the specified filter criteria. The Provider List page displays.

5. In the columns of the **Provider List** table, view the following information for each provider record displayed:

- Detail (click the 🔍 icon to display detailed provider information)
- Last Name
- First Name
- Provider Account #
- Specialty
- Billing Entity
- County

> **Tip:** You can change how the information in the **Provider List** table is sorted and displayed by clicking on the column headings. You can click the 🔍 icon in the **Detail** column to view detailed provider information. The Provider Account Detail page displays when clicked.

Search for an Unattached Referral

Use this exercise to search for an unattached referral within the database, and attach the referral to the child's record.

Complete the following steps to finish this exercise:

1. On the **Child Care Management** pull-down menu, select the **Search** menu option. A sub-menu displays.

2. Select the **Unattached Referrals** sub-menu option. The Unattached Referral Search page displays.

> 🔶 **Tip:** Some of the fields on the **Unattached Referral Search** page allow the entry of partial information to help you narrow your search.

3. Under **Primary Search Criteria**, enter filter criteria in the following fields as necessary to perform a search:

- Child Last Name

- Child First Name

- Referral Type

> ✎**Note:** A search cannot be performed using a child's first name without also using a child's last name. If an entry is not made in **Child First Name** or **Child Last Name**, a selection is required in **Referral Type**.

4. Under **Optional Search Criteria**, enter filter criteria in the following fields as necessary to perform a search for referrals made within a specified date range:

- Referral Date

- To

> ✎**Note:** A search can be performed without specifying any search criteria, primary or optional. If no criteria are specified, all unattached referrals will be displayed on the Unattached Referral List when **Search** is clicked.

5. Click **Search** to perform a search based on the specified filter criteria. The Unattached Referral List page displays.

6. Select the radio button in the **Select** column of the **Unattached Referral List** table to select a specific referral to be attached to a child's record.

7. Click the 🔍 icon next to **Child ID**. The Child Search page displays.

8. Select the appropriate radio button and enter filter criteria in the following fields as necessary to perform a search:

- Child ID (a complete child ID number must be entered)

- Last Name (a minimum of 2 characters must be entered to perform a search by last name)

- First Name (a search cannot be performed by entering only a child's first name)

9. Click **Search** to perform a search based on the specified filter criteria. The Child List page displays.

10. Click the link in the **Select** column to select the child to which the referral will be attached. The Unattached Referral List page displays.

Tip: Once the Unattached Referral List page displays, information specific to the child selected is displayed in the **Child ID**, **Child Name**, and **Current Enrollment** fields. This information is read-only and cannot be changed.

11. Select the **Attach Referral and Open Child's Record** check box as necessary to display the Child Detail page for the child after the Attach Referral process is complete.

12. Click **Attach Referral**.

Referrals

There are three types of referrals for the online system. Once the referral is submitted, a backend process will deliver the referral to the appropriate Admin Location's referral queue – waiting for review. The admin location will review the referral data and process valid referrals into the Child Care Management system.

Referral Types

- **NICU** – Hospitals with Neonatal Intensive Care Units (NICU) referring to the program will use the same access as the public. They will select the Neonatal Intensive Care Unit link. A page is displayed requesting an Access Code. Once the user supplies the access code, the NICU referral form is available to submit a referral.
- **Internal** – Referrals created by users logged into the system. These referrals are not processed but automatically accepted into the database after the detect duplicates process completes.
- **Online** – Referrals received from the public using the website. The public may submit a referral for any child into First Steps program as long as the referring source meets the state's requirements. The Online referral form is available to the public from the First Steps for the Family page.

Enter a NICU Child Referral

Use this exercise to complete the NICU referral process for a child.

Complete the following steps to finish this exercise:

1. On the Home page, click the **First Steps for the Family** link. The Missouri First Steps – Family page displays.

2. Select the **Refer A Child** link. The Referral Source page displays.

3. On the Referral Source page, select a NICU referral source under **Select a Referral Source to Refer a Child** button. The NICU Access page displays.

4. Enter the state-provided NICU **Access Code**. The Child Referral page displays.

5. Complete the following information under **Child**:

- Last Name (a minimum of 2 characters is required)
- First Name

- Date of Birth
- Gender
- Birth Weight (Grams)
- Gestational Age (Weeks)
- County of Residence

6. Complete the following information under **Contact Person for Child**:

- Last Name (a minimum of 2 characters is required)
- First Name
- Address
- City
- State
- Zip
- Relationship to Child
- Phone
- Email

7. Click **Next**. The Referral Information page displays.

8. In **Referral Completed by**, enter the name of the person who completed the referral. At least two characters must be entered in this text box.

9. In **Email**, enter the current email address for the person who completed the referral. You can enter up to 50 characters digits in this text box. A valid email address format must be entered.

10. In **Phone**, enter the primary telephone number for the person who completed the referral. You can enter up to 25 numeric digits in this text box.

11. In **Fax**, enter the fax number for the person who completed the referral. You can enter up to 25 numeric digits in this text box.

12. In the **Hospital** drop-down list, select the name of the hospital that referred the child.

13. In **Referring Physician's Name**, enter the first and last name of the physician that referred the child. You can enter up to 65 characters in this text box.

14. In **Family Informed of this Referral**, select the **Yes** radio button or the **No** radio button to indicate that the child's family has been informed of the child's referral. This is required information.

15. In **Is Child Hospitalized?**, select the **Yes** radio button or the **No** radio button to indicate that the child is currently hospitalized.

16. Under **Referral Reason**, select one or more of the following check boxes as necessary to indicate the reason for the child's referral:

- Medical Condition Associated with Mental Retardation/Developmental Disability Exists

AND/OR

- Very Low Birth Weight and One or More of the Following Conditions Exist:

    - Intra-cranial Bleeds (Grade II, III, IV)

    - Apgar of 6 or Less

    - Ventilator or CPAP Dependent for 72 Hours or More

    - Asphyxiation

> **Note:** If the **Very Low Birth Weight and One or More of the Following Conditions Exist** check box is selected, at least one of the options below it must be selected.

17. In **ICD9**, enter a valid ICD9 code for the child. You can enter up to 10 characters in this text box (the system will validate the DX code when saved).

18. In **Comments**, enter any additional comments relevant to the reason for the child's referral. You can enter up to 250 characters in this text box. If

none of the **Referral Reason** check boxes are selected, this is required information.

19. Click **Next**. The <u>Primary Medical Care Provider</u> page displays.

20. In **Last Name**, enter the last name of the child's primary medical care provider. You can enter up to 40 characters in this text box.

21. In **First Name**, enter the first name of the child's primary medical care provider. You can enter up to 25 characters in this text box.

22. In **Address**, enter the primary medical care provider's street address information. You can enter up to 50 characters in each of the two address text boxes available.

23. In **City**, enter the name of the city in which the primary medical care provider practices. You can enter up to 40 characters in this text box.

24. In **State**, enter the abbreviation of the state in which the primary medical care provider currently practices. You can enter up to two characters in this text box.

25. In **Zip**, enter the Zip code in which the child's primary medical care provider currently practices. You can enter up to twelve numeric digits in this text box.

26. In **Phone**, enter the primary telephone number for the child's primary medical care provider. You can enter up to 25 numeric digits in this text box.

27. In **Mobile Phone**, enter the cellular telephone number (or mobile telephone number) for the child's primary medical care provider. You can enter up to 25 numeric digits in this text box.

28. In **Fax**, enter the fax number for the child's primary medical care provider. You can enter up to 25 numeric digits in this text box.

29. In **Email**, enter the current email address for the contact person. You can enter up to 50 characters digits in this text box. A valid email address format must be entered.

30. Click **Submit**.
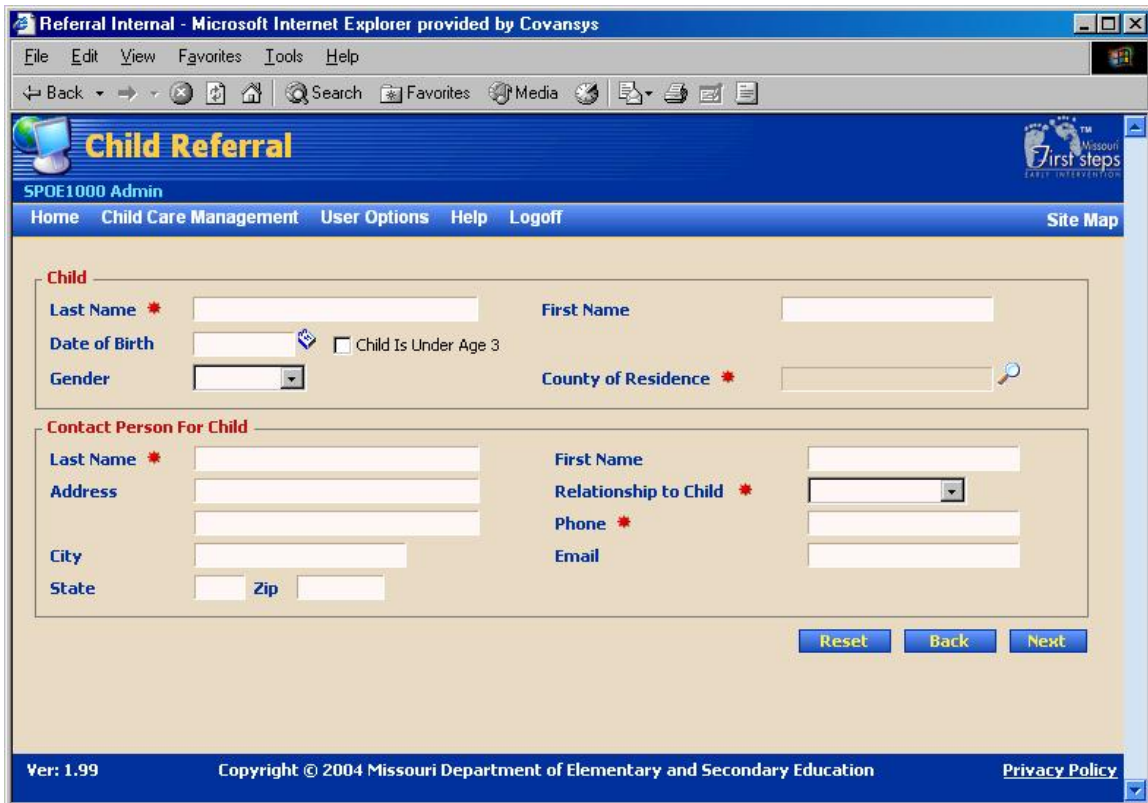
Enter a New Child Referral

Use this exercise to enter a new referral to the application.

> **Tip:** New referrals are added within the application by using the **Child Care Management** menu.

Complete the following steps to finish this exercise:

1. On the **Child Care Management** menu, select the **Referral** menu option. A sub-menu displays.

2. Select the **New Referral** sub-menu option. The Child Referral page displays.

3. Complete the following information under **Child**:

- Last Name (a minimum of 2 characters is required)
- First Name
- Date of Birth or Child is Under Age 3
- Gender
- County of Residence (selected by County Search)

4. Complete the following information under **Contact Person for Child**:

- Last Name (a minimum of 2 characters is required)
- First Name
- Address
- City
- State
- Zip
- Relationship to Child
- Phone
- Email

5. Click **Next**. The Referral Information page displays.

6. In the **Referral Source** drop-down list, select the source that referred the child.

7. In **Referral Date**, enter date on which the referral was received at the E.I. location. The date entered is the start of the 45-day referral to IFSP period. The default is today's date. The date entered must be less than or equal to today's date.

8. Select the **Same as Contact** check box to indicate that the person referring the child is the same as the child's contact person.

Note: If **Same as Contact** is selected, the referring person's information is not required if a phone number or address was entered under **Contact Person for Child**.

9. In **Last Name**, enter the referring person's last name. You can enter up to 40 characters in this text box. This is required information whenever **Same as Contact** is not selected. When required, a minimum of 2 characters must be entered.

10. In **First Name**, enter the referring person's first name. You can enter up to 25 characters in this text box.

11. In **Phone**, enter the primary telephone number for the referring person. You can enter up to 25 numeric digits in this text box. This is required information whenever **Same as Contact** is not selected.

12. In **Email**, enter the current email address for the referring person. You can enter up to 50 characters digits in this text box. A valid email address format must be entered.

13. In **Family Informed of this Referral?**, select the **Yes** radio button or the **No** radio button to indicate that the child's family has been informed of the child's referral.

14. In **Reason for Referral**, enter the reason for the child's referral. You can enter up to 250 characters in this text box.

15. Click **Submit**.

Enter an Online Child Referral

Use this exercise to complete the Online referral process for a child.

Complete the following steps to finish this exercise:

1. On the Home page, click the **First Steps for the Family** link. The Missouri First Steps – Family page displays.

- SPOE Locations
- Service Matrix
- Refer A Child
- Family Surveys
- Report Issue

2. Select the **Refer A Child** link. The Referral Source page displays.
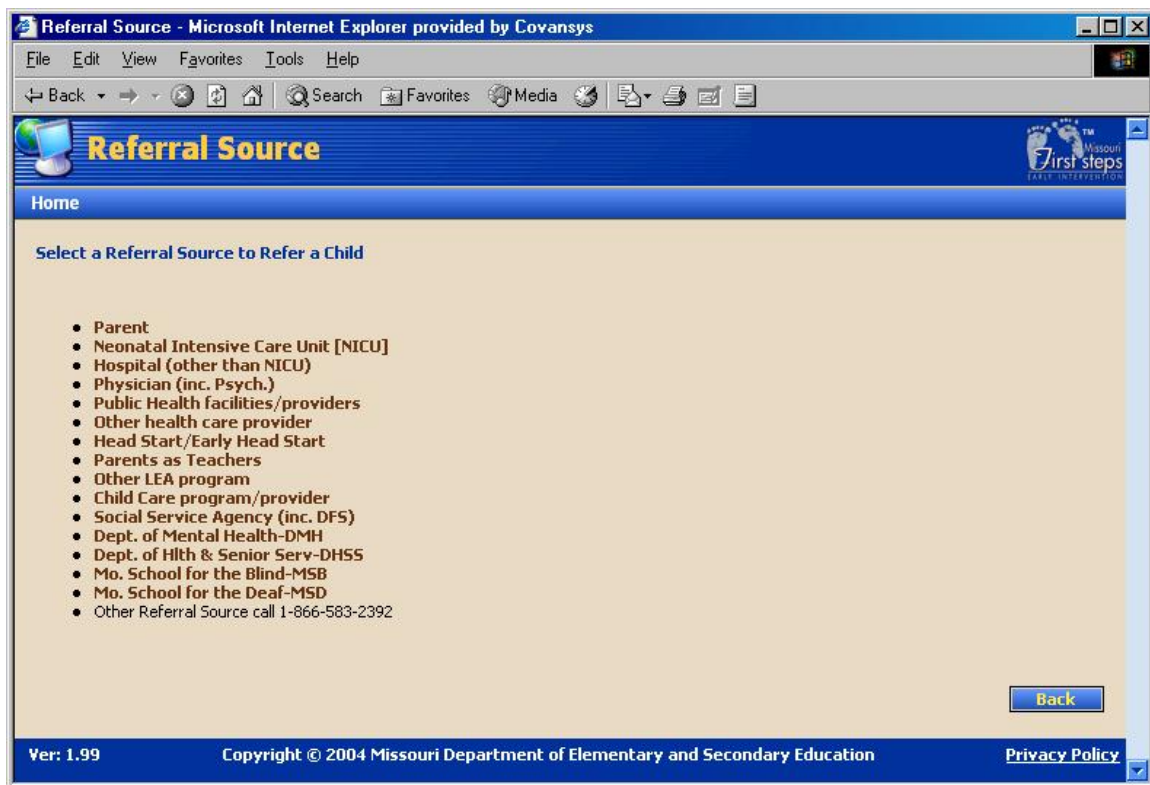
3. On the Referral Source page, select a referral source from the **Select a Referral Source to Refer a Child** list. The Child Referral for Missouri First Steps page displays.

4. Complete the following information under **Child**:

- Last Name
- First Name
- Date of Birth or Child is Under Age 3
- Gender
- County of Residence (selected by County Search)

5. Complete the following information under **Contact Person for Child**:

- Last Name (a minimum of 2 letters is required)
- First Name
- Address
- City
- State
- Zip
- Relationship to Child
- Phone
- Email

6. Click **Next**. The Referral Information page displays.

7. In the **Referral Source** drop-down list, select the name of the source that referred the child.

> **Tip:** The **Referral Source** drop-down list contains a default selection when entering an online or a NICU referral. This selection can be updated as necessary.

8. Select the **Same as Contact** check box to indicate that the person referring the child is the same as the child's contact person.

> **Note:** If **Same as Contact** is selected, the referring person's information is not required if a phone number or address was entered under **Contact Person for Child**.

9. In **Last Name**, enter the referring person's last name. You can enter up to 40 characters in this text box. This is required information whenever **Same as Contact** is not selected. When required, a minimum of 2 characters must be entered.

10. In **First Name**, enter the referring person's first name. You can enter up to 25 characters in this text box.

11. In **Phone**, enter the primary telephone number for the referring person. You can enter up to 25 numeric digits in this text box. This is required information whenever **Same as Contact** is not selected.

12. In **Email**, enter the current email address for the referring person. You can enter up to 50 characters digits in this text box. A valid email address format must be entered.

13. In **Family Informed of this Referral?**, select the **Yes** radio button or the **No** radio button to indicate that the child's family has been informed of the child's referral.

14. In **Reason for Referral**, enter the reason for the child's referral. You can enter up to 250 characters in this text box.

15. Click **Submit**.

Perform Referral Processing

Use this exercise to complete referral processing functions. All referrals submitted from outside sources (Online and NICU Referral Forms) must be viewed and accepted prior to the creation of a new child's record. The Referral Processing function allows either the Case Administrator for the Admin Location or the Intake Coordinator to view the referral information submitted and the user has the option to accept, reject, or transfer the referral to another Admin Location.

> ✎**Note:** An Intake Coordinator who is logged on and processing referrals is automatically assigned by the system as the Intake Coordinator for the child's record.

Complete the following steps to finish this exercise:

1. On the **Child Care Management** menu, select the **Referral** menu option. A sub-menu displays.

2. Select the **Referral Processing** sub-menu option. The Referral Processing page displays.

3. View the following information about the currently displayed referral:

- **Child Name** displays the first name and last name of the child.

- **Contact Person for Child** displays the first name and last name of the child's contact person.

- **County of Residence** displays the name of the county in which the child resides.

- **Relationship to Child** displays the relationship of the contact person to the child.

- **Contact Phone** displays the primary phone number of the child's contact person.

- **Referred By** displays the first name and last name of the person that referred the child.

- **Referral Source** displays the source that referred the child.

- **Referral Date** displays enter date on which the referral record was first viewed at the E.I. location.

- **Phone** displays the phone number of the person who referred the child.

- **Email** displays the email address of the person who referred the child.

- **Referrals Remaining** displays the total number of referrals that are waiting to be processed.

4. Under **Referral Action**, select one of the following radio buttons to accept, reject, or transfer the child's referral:

- Select the **Accept** radio button to accept the current child's referral.

- Select the **Reject** radio button to reject the current child's referral.

- Select the **Transfer** radio button to transfer the current child's referral to another E.I. location.

5. In the **Reject Reason** drop-down list, select the reason for rejecting the child's referral. This is required information whenever the **Reject** radio button is selected.

6. In the **Transfer to Location** drop-down list, select the location to which you want to transfer the child's referral. This is required information whenever the **Transfer** radio button is selected.

7. Click **Save** to save any information that was entered on the **Referral Processing** page and complete the referral process for the current child, or click **Next Referral** to process the next referral that is ready for review.

Note: When **Save** is clicked, the system runs the detect duplicates process. Once the detect duplicates process is completed, either the Detect Duplicates page is displayed, or you are returned to the Referral Processing page.

Note: When you are returned to the Referral Processing page, the **Next Referral** button must be selected to continue the processing of referrals. Clicking **Next Referral** displays the next referral waiting to be processed. Referrals are displayed in the order they are received or submitted. The oldest referral is displayed first.

Detecting Duplicates

Detect duplicates is a backend process that is generated when a new referral is entered manually and submitted to the database, or when a referral is accepted during Referral Processing. During the Detect Duplicates process, the system checks the database against child records that are currently in the system and performs a comparison on specific data fields (including name and date of birth). Any records that are found to contain similar name and date of birth information are flagged as potential duplicate records.

> **Note:** If a duplicate is not detected during the Detect Duplicates backend process, a new child's record is created and the Detect Duplicates page will not display. In addition, the Intake Coordinator currently logged on is automatically assigned to the child's record by the system. Otherwise, the Case Administrator will assign the Intake Coordinator when the child's page is displayed.
>
> The Detect Duplicates page displays only if referral record is determined to be a possible duplicate of an existing child record. Children under the age of 4 years will not be displayed or considered as possible duplicates.

If the system determines that a referral record is a potential duplicate, Detect Duplicates page displays:

Use this page to view a list of possible duplicates (both statewide and local), determine whether the new child record is a duplicate, and (if the record is not a duplicate) complete the referral process. Specific data displays on this page to help you verify whether the record is a duplicate:

Viewing the New Child's Information

At the top of the page, view the following information about the new child that is currently being created:

- **Child Name** displays the first and last name of the new child that is currently being created.
- **Address** displays the current address information of the new child that is currently being created.
- **Gender** displays the gender of the new child that is currently being created.
- **Date of Birth** displays the date of birth of the new child that is currently being created.
- **County of Residence** displays the name of the current county in which the new child that is currently being created is located.

Viewing Potentially Duplicate Local Child Records

Possible duplicates are displayed in two separate tables on this page. If the duplicate record is for the current admin location processing the referral, the matching records are displayed in the local table. In the columns of the **Possible Matches for Duplicates – Locally** table, view the following information for each local record that is a possible duplicate:

- **Select** provides a selection to indicate that new child record is in fact a duplicate of the selected record. You can click the radio button in this column to identify that the new child record is a duplicate of the selected record.
- **Last Name** displays the last name of each child identified as a possible duplicate within the local database.
- **First Name** displays the first name of each child identified as a possible duplicate within the local database.
- **Child Id** displays the state identification number of each child identified as a possible duplicate within the local database.
- **DOB** displays the date of birth of each child identified as a possible duplicate within the local database.
- **Location** displays the admin location(s) assigned to each child identified as a possible duplicate within the local database.
- **Status** displays the current status of each child identified as a possible duplicate within the local database.
- **Address** displays the current address information of each child identified as a possible duplicate within the local database.

Viewing Potentially Duplicate Statewide Child Records

Possible matches outside of the current admin location are displayed on the statewide table. In the columns of the **Possible Matches for Duplicates – Statewide** table, view the following information for each statewide record that is a possible duplicate:

- **Last Name** displays the last name of each child identified as a possible duplicate within the statewide database.
- **First Name** displays the first name of each child identified as a possible duplicate within the statewide database.
- **DOB** displays the date of birth of each child identified as a possible duplicate within the statewide database.
- **Address** displays the current address information of each child identified as a possible duplicate within the statewide database.
- **Child Id** displays the identification number of each child identified as a possible duplicate within the statewide database.
- **Status** displays the current status of each child identified as a possible duplicate within the statewide database.
- **Location** displays the admin location(s) assigned to each child identified as a possible duplicate within the statewide database.

Processing Potentially Duplicate Referrals

You have different ways of handling a potential duplicate referral. This section will identify the possible actions that can be taken.

The Referral is Not a Duplicate

If the referral is not considered a duplicate, a new child's record can be created and additional information may be entered. Complete the following steps to create the new child's record:

1. In **Save Referral As**, select the **New Child** option.
2. In **Intake Coordinator**, view and/or select the name of the Intake Coordinator assigned to the new child. The default is blank if the user logged in is a Case Administrator.
3. Click **Save**.

When the **New Child** option is selected and **Save** is clicked, the following actions take place:

- The referral record is saved as a new referral.
- The System creates and assigned a new Child State Id to the record.
- If the user logged on is an Intake Coordinator, the system assigns the logged on user as the Intake Coordinator for the child's record.
- If the user was entering an Internal referral, the user is displayed the Child Detail page.
- If user was processing new referrals, the user is returned to the Referral-Processing page.

The Referral is a Duplicate

If the referral is considered a duplicate, several options are available to continue processing the referral. Complete the following steps to create the new child's record:

1. In **Save Referral As**, select one of the following options:

   - **New Enrollment** – saves the referral as a new enrollment record for the child selected in the local table. (The child's record must not currently be in an active enrollment period for this option to be selected.)

   - **Referral Only** – saves the referral record only, without creating a new Child State ID or attaching the referral to the enrollment record of an existing child.

   - **Additional Referral** – saves the referral record an additional referral source to the child record currently selected in the local table. (The record must be located at the current admin location and the child's record must currently be in an active enrollment period for this option to be selected.)

   - **Transfer** – transfers the referral record to another admin location without creating a new Child State ID or attaching the referral to the enrollment record of an existing child.

   - **Cancel** – returns the user to the Referral Information page, saves the referral to the database as a **Referral Only** (accepted), and allows the to enter new internal referral.

2. In **Intake Coordinator**, view and/or select the name of the Intake Coordinator assigned to the new child. The default is blank if the user logged in is a Case Administrator.

3. If **New Enrollment** or **Additional Referral** was selected in the **Save Referral As** drop-down list, then you are also required to select a record in the local table. Click the link in the **Select** column of the **Possible Matches for Duplicates – Locally** table.

4. If **Transfer** was selected in the **Save Referral As** drop-down list, then you are also required to select an option in the **Transfer to Location** drop-down list.

5. Click **Save**.

When the **New Enrollment** option is selected and **Save** is clicked, the following actions take place:

- The referral record is saved as a new enrollment record for the child selected in the local table.
- The start date is assigned as the referral accepted date for the selected child, and the referral is added as the primary referral for the enrollment.
- The Child Detail page displays if this child currently resides at this admin location.
- If the user logged on is an Intake Coordinator, the system assigns the logged on user as the Intake Coordinator for the child's record for this enrollment period.
- When a new Intake Coordinator is assigned, the system ends any prior Intake Coordinator assignments using the end date rules for Intake Coordinator assignment.
- If the referral is a NICU referral, then a referral reason is added to the child's neonatal health record and an ICD code is added to the child's diagnosis record.

When the **Referral Only** option is selected and **Save** is clicked, the referral record is saved without creating a new Child State ID or attaching to the enrollment record of an existing child.

> **Note:** Use the **Referral Only** option when the Child's record could exist in the system, but it may not be at the current admin location. Then, once the child's record is transferred to the local admin location, the Case Administrator or the Intake Coordinator assigned to the child's record will have the availability to attach the referral to the child's record. Once transferred, if the child is in an active enrollment, the referral will attach as an additional referral. Otherwise, the system begins a new enrollment period for the child once the referral is transferred.

When the **Additional Referral** option is selected and **Save** is clicked, the referral record is saved an additional referral source to the active enrollment period for the child record currently selected in the local table.

When the **Transfer** option is selected and **Save** is clicked, the record transfer to another admin location without creating a new child state id or attaching to the enrollment record of an existing child.

> **Note:** When the **Transfer** option is used, a **Transfer to Location** must be selected. In addition, an **Intake Coordinator** should not be selected, and no potential duplicates should be selected in the local table.

When the **Cancel** option is selected and **Save** is clicked, the following actions take place:

- The user is returned to the previous page.
- The referral is not accepted.
- If user was processing referrals, the user is returned to the Referral-Processing page where they can select another option for processing the referral (like transfer or reject).
- If the user was creating a new internal referral, the user is returned to the Referral Information page and the referral information is not saved.

> **Note:** When the **Cancel** option is used, the referral will need to be attached to a child's record at another time. If the referral is redisplayed to the user, the user may select another action (Reject or Transfer) for the referral. This process needs to be completed manually.

the user is returned to the previous page….the referral is not accepted, the user is just returned to the originating page. If referral processing they can select another option for processing the referral like transfer or reject

> **Note:** If you accessed the Detect Duplicates page from referral processing, you are returned to the Referral Processing page when the Detect Duplicates page is closed. If the referral was entered internally, the new child's record is opened and the Child Detail page displays when the Detect Duplicates page is closed.

> **Note:** Depending on the status of the child's record and the role of the user who is accessing the file, some of the detail pages for the new child's record may be view-only until specific data exists.

Child Information

Enter or Update Child Detail Information

Use this exercise to see how to enter or update detailed information about a child.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Enter or update the following information as necessary:

    - MO State ID
    - Last Name (a minimum of 2 characters is required)

- MI
- First Name
- AKA Name
- Gender
- Race
- Ethnicity

3. Click **Save**.

Assign an Intake Coordinator to a Child

Use this exercise to assign an Intake Coordinator to a child.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click **Service Coordination**. The Service Coordination History page displays.

3. Click **Assign Intake Coordinator**. The Intake Coordinator page displays.

4. Select an **Intake Coordinator** to assign the child's record.

5. Enter or select a **Start Date** on which the selected intake coordinator will take responsibility for maintaining the child's record. You can click the ✥ icon to select a date from a calendar. The date entered must be equal to or greater than the referral acceptance date.

📝**Note:** A replacement coordinator cannot be assigned a **Start Date** that occurs before a previously assigned coordinator's **End Date**. Entering or selecting an **End Date** will prevent the coordinator history record from being changed once the record has been saved. The **Start Date** must be equal to today's date or a future date for replacement coordinator.

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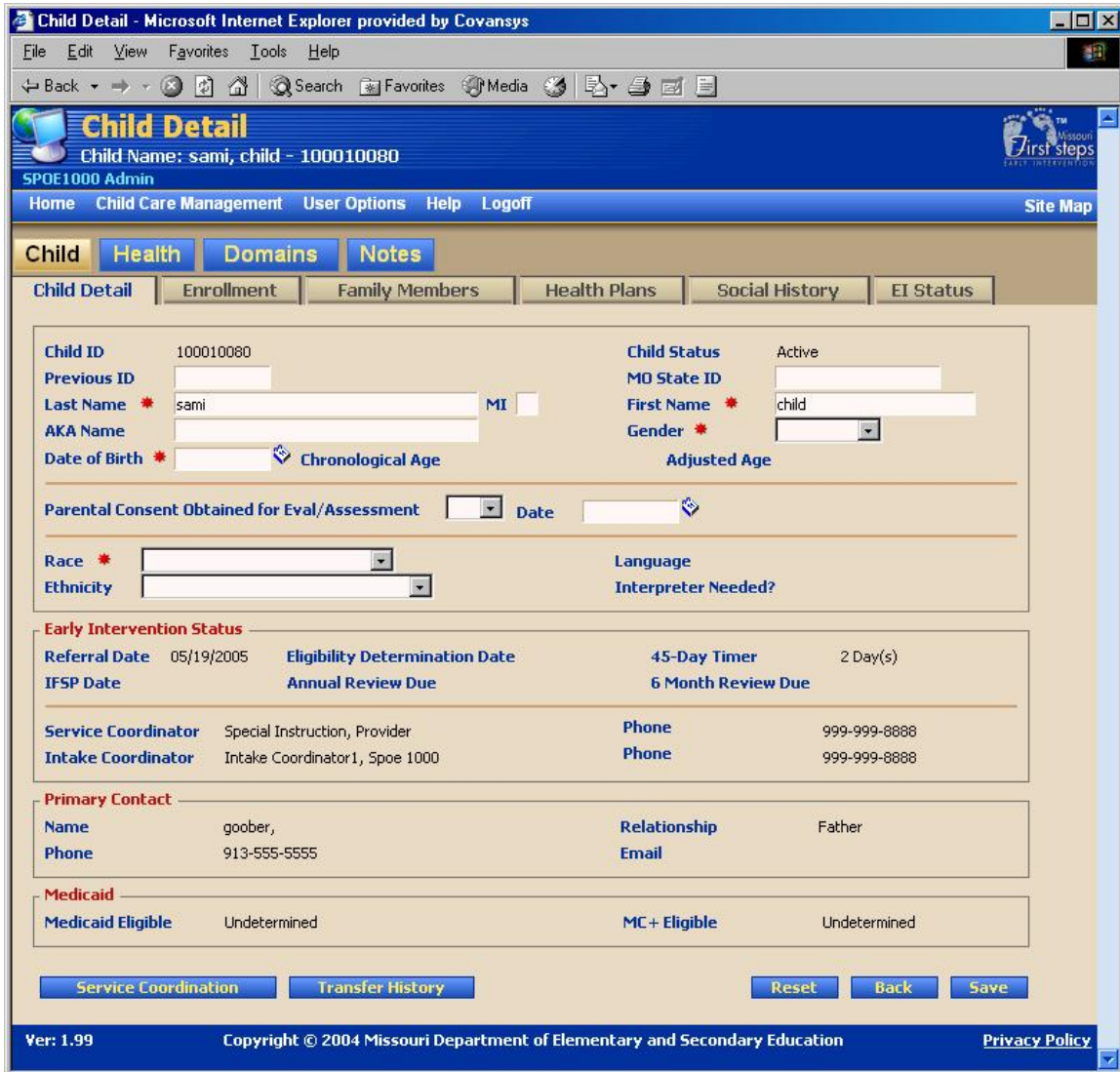
6. Click **Save**.

End an Intake Coordinator's Assignment to a Child

Use this exercise to end the period during which a specific Intake Coordinator is assigned to oversee a child's records and the benefits the child receives within the Early Intervention program.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click **Service Coordination**. The Service Coordination History page displays.

🔍**Tip:** Under **Search Filter**, you can select from several filtering options for the **Service Coordination List** table. You can select the **Intake Coordinator** option to display only Intake Coordinator s in the table. Or, you can select the **Ongoing Service Coordinator** option to display only service coordinators in the table. (The **Both** option displays coordinators of all types in the table when selected.) When the selection under **Search Filter** is changed, the information displayed in the **Service Coordination List** table is refreshed.

3. Click the **Detail** icon next to an Intake Coordinator record in the **Service Coordination List** table. The Intake Coordinator page displays.

4. Enter or select the **End Date**. You can click the icon to select a date from a calendar.

> **Note:** A replacement coordinator cannot be assigned a **Start Date** that occurs before a previously assigned coordinator's **End Date**. Entering or selecting an **End Date** will prevent the coordinator history record from being changed once the record has been saved.

5. Click **Save**.

Assign a Service Coordinator to a Child

Use this exercise to assign a service coordinator to a child.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔎 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click **Service Coordination**. The Service Coordination History page displays.

3. Click **Assign Service Coordinator**. The Service Coordinator page displays.

> **Tip:** Some of the fields on the **Service Coordinator** page allow the entry of partial information to help you narrow your search.

4. Enter filter criteria in the following fields as necessary to perform a search:

- Last Name
- First Name
- County

5. Click **Search** to perform a search based on the specified filter criteria.
   The **Service Coordinator List** table displays the service coordinators who match the specified filter criteria.

6. Click the link in the **Select** column of the **Service Coordinator List** table to select a specific service coordinator.

7. Enter or select a **Start Date** on which the selected service coordinator will take responsibility for maintaining the child's record. You can click the ✎ icon to select a date from a calendar. The date entered must be equal to or greater than the referral acceptance date.

> **Note:** A replacement coordinator cannot be assigned a **Start Date** that occurs before a previously assigned coordinator's **End Date**. Entering or selecting an **End Date** will prevent the coordinator history record from being changed once the record has been saved.

8. Click **Save**.
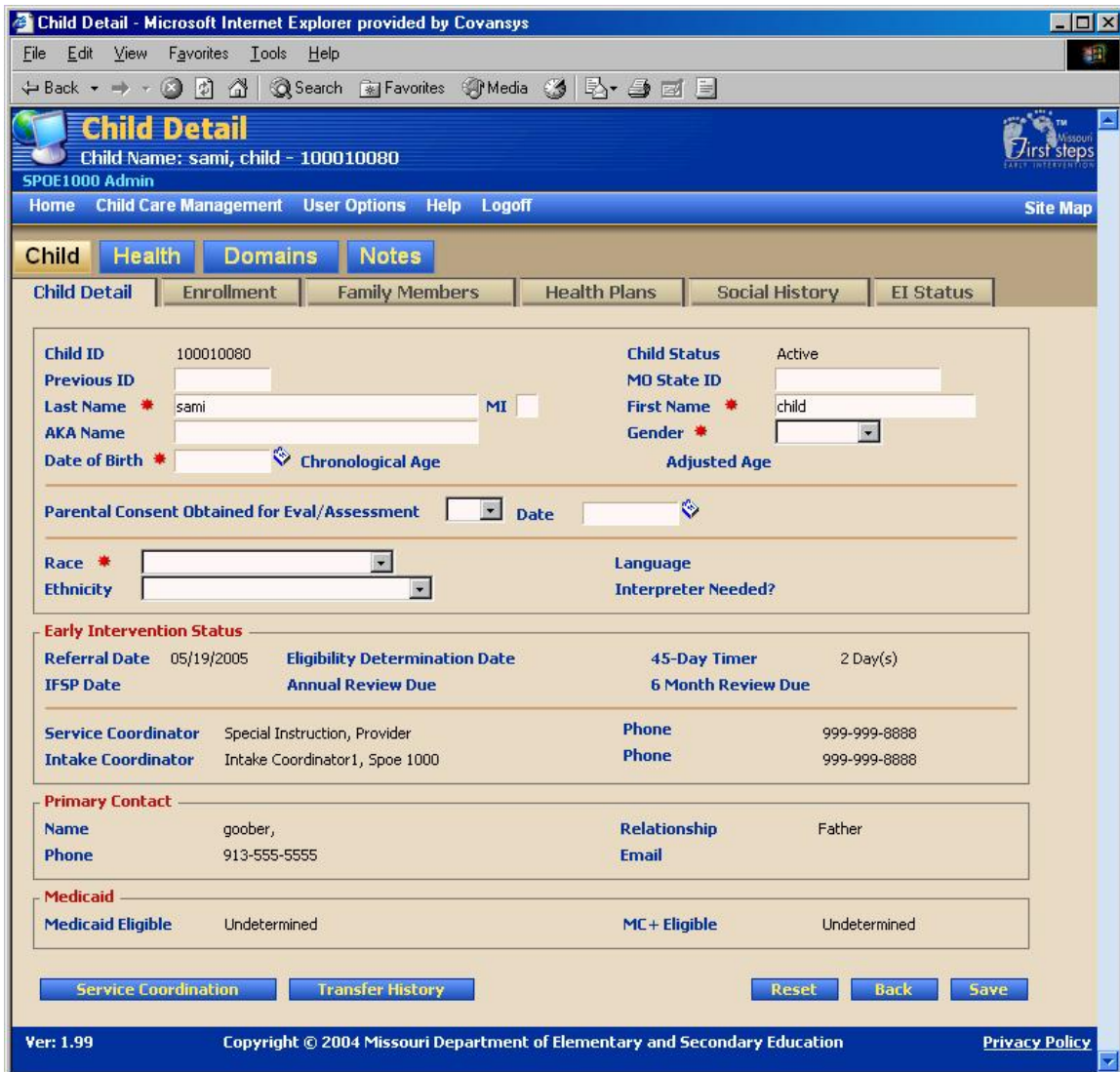
End a Service Coordinator's Assignment to a Child

Use this exercise to end the period during which a specific service coordinator is assigned to oversee a child's records and the benefits the child receives within the Early Intervention program.

> ✎**Note:** The application will automatically end a prior service coordinator assignment when a new service coordinator is assigned to a child. However, if a gap exists in service coordinator assignments, you will still need to end an assignment using this process.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click **Service Coordination**. The Service Coordination History page displays.

Tip: Under **Search Filter**, you can select from several filtering options for the **Service Coordination List** table. You can select the **Intake Coordinator** option to display only Intake Coordinator s in the table. Or, you can select the **Ongoing Service Coordinator** option to display only service coordinators in the table. (The **Both** option displays coordinators of all types in the table when selected.) When the selection under **Search Filter** is changed, the information displayed in the **Service Coordination List** table is refreshed.

3. Click the **Detail** icon next to an service coordinator's record in the **Service Coordination List** table. The Service Coordinator page displays.

4. Enter or select the **End Date**. You can click the ✥ icon to select a date from a calendar.

✎**Note:** A replacement coordinator cannot be assigned a **Start Date** that occurs before a previously assigned coordinator's **End Date**. Entering or selecting an **End Date** will prevent the coordinator history record from being changed once the record has been saved.

5. Click **Save**.

View the Transfer History for a Child

Use this exercise to view the transfer history for a child.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click **Transfer History**. The Transfer History page displays.

3. View the transfer history for the child in the **Transfer List** table.

Tip: Under **Search Filter**, you can select an option from the drop-down list to change the type of transfers that are displayed in the **Transfer List** table. By default, both Location and Household transfers are displayed in the table. When a different option is selected, the information displayed in the **Transfer List** table is refreshed.

Perform a Location Transfer for a Child's Record

Use this exercise to transfer a child's record to a different administrative location.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click **Transfer History**. The Transfer History page displays.

3. Click **Location Transfer**. The Location Transfer page displays.

4. Select the **Location Description** to which to transfer the child's record.

5. Enter or select the **Start Date** on which the new location will begin administration of the child's record. You can click the ❖ icon to select a date from a calendar. The start date entered or selected must be equal to or greater than today's date.

6. Click **Save**.

Transfer a Child's Record to a Different Household

Use this exercise to transfer a child's record to a different household from the Child Detail page.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click **Transfer History**. The Transfer History page displays.

3. Click **Household Transfer**. The Household Transfer page displays.

4. Click the 🔍 icon displayed to the right of the **Household ID** field. The Household ID Search page displays.

5. Select the appropriate radio button and enter filter criteria in the following fields as necessary to perform a search:

- Last Name (a minimum of 2 characters must be entered)

- First Name

- Household ID (a complete ID must be entered)

- Phone

6. Click **Search** to perform a search based on the specified filter criteria. The information displayed in the **Household List** table is refreshed.

7. In the **Household List** table, click the link in the **Select** column to specify the household to which you want to transfer the child's record. The Household Transfer page displays.

8. Click **Save**.

Create a New Household during a Household Transfer

Use this exercise to create a new household record while performing a household transfer from the Child Detail page.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click **Transfer History**. The Transfer History page displays.

3. Click **Household Transfer**. The Household Transfer page displays.

4. Click the 🔍 icon displayed to the right of the **Household ID** field. The Household ID Search page displays.

5. Click **New Household**. The Household Transfer page displays.

6. In **Last Name**, enter the last name of the head of household.

7. In **MI**, enter the middle initial of the head of household.

8. In **First Name**, enter the first name of the head of household.

9. In **Relationship**, select the head of household's relationship to the child.

10. In **Address**, enter the street address information for the head of household.

11. In **Zip**, enter the code for the postal zone in which the head of household resides. When a valid ZIP code is entered, **City** and **State** are automatically updated.

12. In **Home Phone**, enter the head of household's home phone number.

13. In **Work Phone**, enter the head of household's work phone number.

14. In **Other Phone**, enter an alternate phone number at which the head of household can be reached.

15. In **Best Time to Call**, select a time frame during which the head of household prefers to be contacted.

16. In **Email**, enter the email address at which the head of household can be reached.

17. In **Language**, select the primary language spoken by the head of household.

18. In **Interpreter Needed**, select the **Yes** or **No** radio button to indicate whether the head of household needs an interpreter to speak the language selected.

19. In **Role**, select the appropriate check boxes to specify one or more roles that apply to the head of household. **Educational Decision Maker**, **Primary Contact**, and **Household Member** are the options available.

20. In **Effective Date**, enter or select the date on which the new head of household becomes effective for the child. You can click the 🖱 icon to select a date from a calendar.

21. Click **Save**.
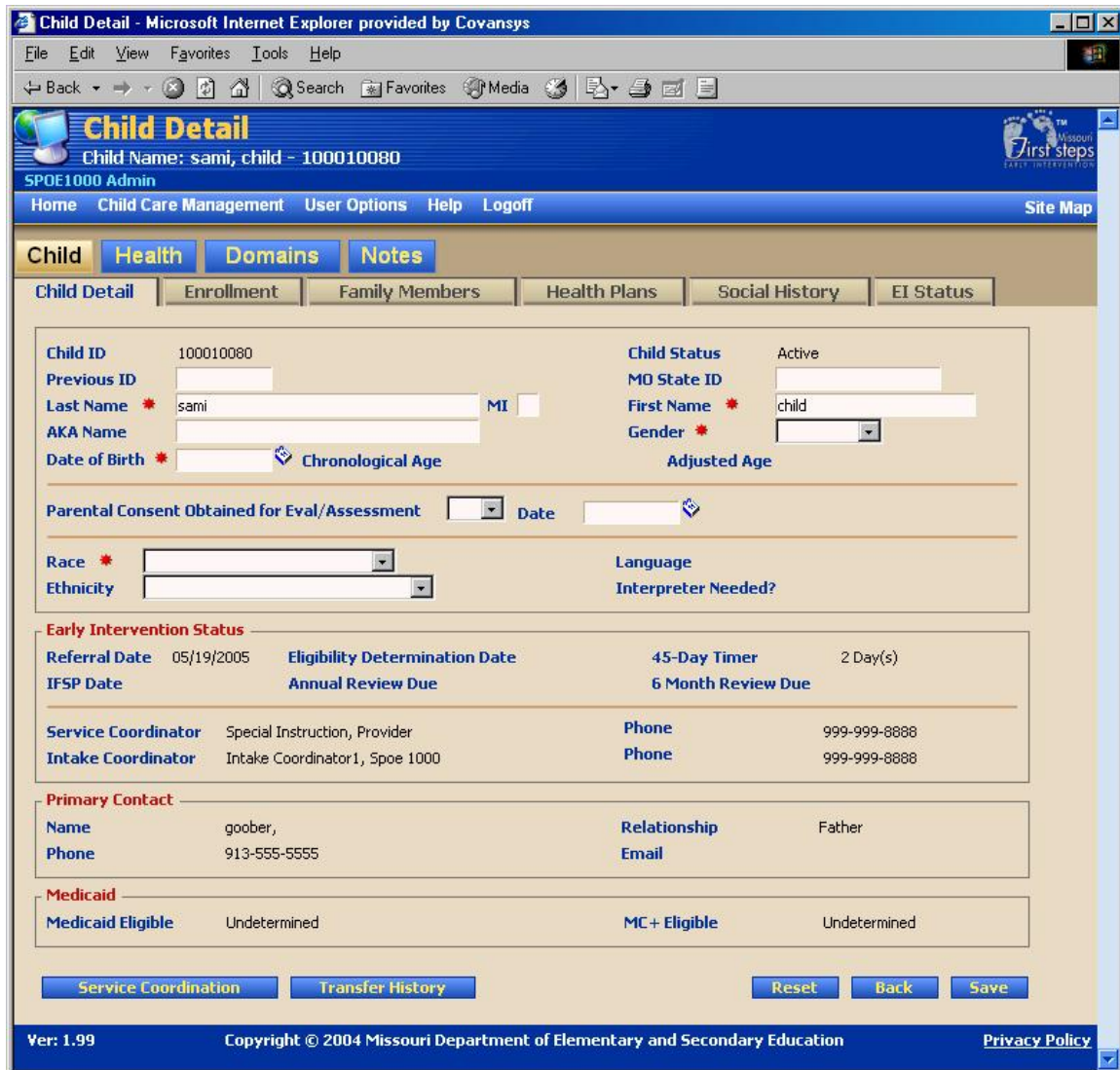
Enrollment Information

View the Details of an Enrollment Period

Use this exercise to display detailed information about a child's enrollment period.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Enrollment** tab. The Enrollment List page displays.

Tip: If no previous enrollments exist for the child, the Enrollment Detail page (pictured below) displays the current enrollment's information automatically when the **Enrollment** tab is clicked. If previous enrollments exist, the Enrollment List: page displays instead.

3. View the following information about the current enrollment:

- Enrollment From

- To

- Reason

4. In the columns of the **Referral List** table, view the following information for each enrollment record:

- Detail

- Referral Source

- Referred By

- Referral Date

- Referral Type
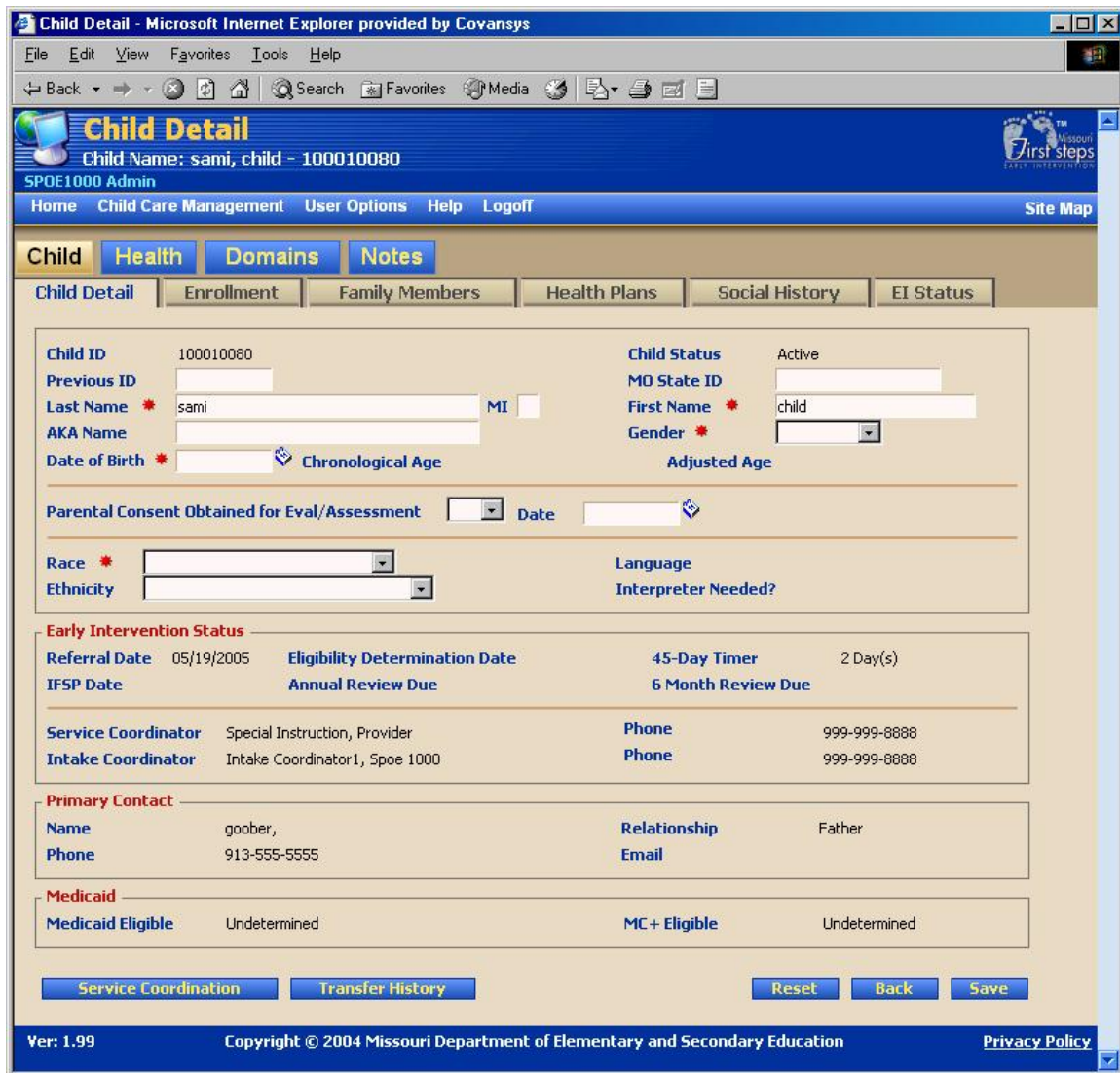
Tip: You can click the 🔍 icon in the **Detail** column to display detailed referral source information for the current enrollment.

Add a Referral Source for an Enrollment Period

Use this exercise to enter referral source information for a child's enrollment period.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Enrollment** tab. The Enrollment Detail page displays.

3. Click **Add Referral**. The Referral Detail page displays.

4. Select the **Referral Source**.

5. Enter or select the **Referral Date**. You can click the 🔹 icon to select a date from a calendar.

6. Enter the referrer's **Last Name**.

7. Enter the referrer's **First Name**.

8. Enter the referrer's **Phone** number.

9. Enter the referrer's **Email** address.

10. Enter the **Reason** for the referral.

11. Click **Save**.

End a Child's Enrollment

Use this exercise to end a child's enrollment.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔎 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Enrollment** tab. The Enrollment List page displays.

> 💬**Tip:** If no previous enrollments exist for the child, the Enrollment Detail page displays the current enrollment's information automatically when the **Enrollment** tab is clicked. If you are already on the Enrollment Detail page, you can skip the next step.

3. Click the **Detail** icon next to a specific enrollment in the **Enrollment List** table. The Enrollment Detail page displays.

4. Click **End Enrollment**. The End Enrollment page displays.

5. Enter the **End Enrollment Date**. You can click the ✋ icon to select a date from a calendar.

> **Tip:** Once an enrollment is ended and the record is saved, the **End Enrollment Date** text box cannot be updated or changed.

6. Select a **Reason** for ending the enrollment.

7. Click **Save**.
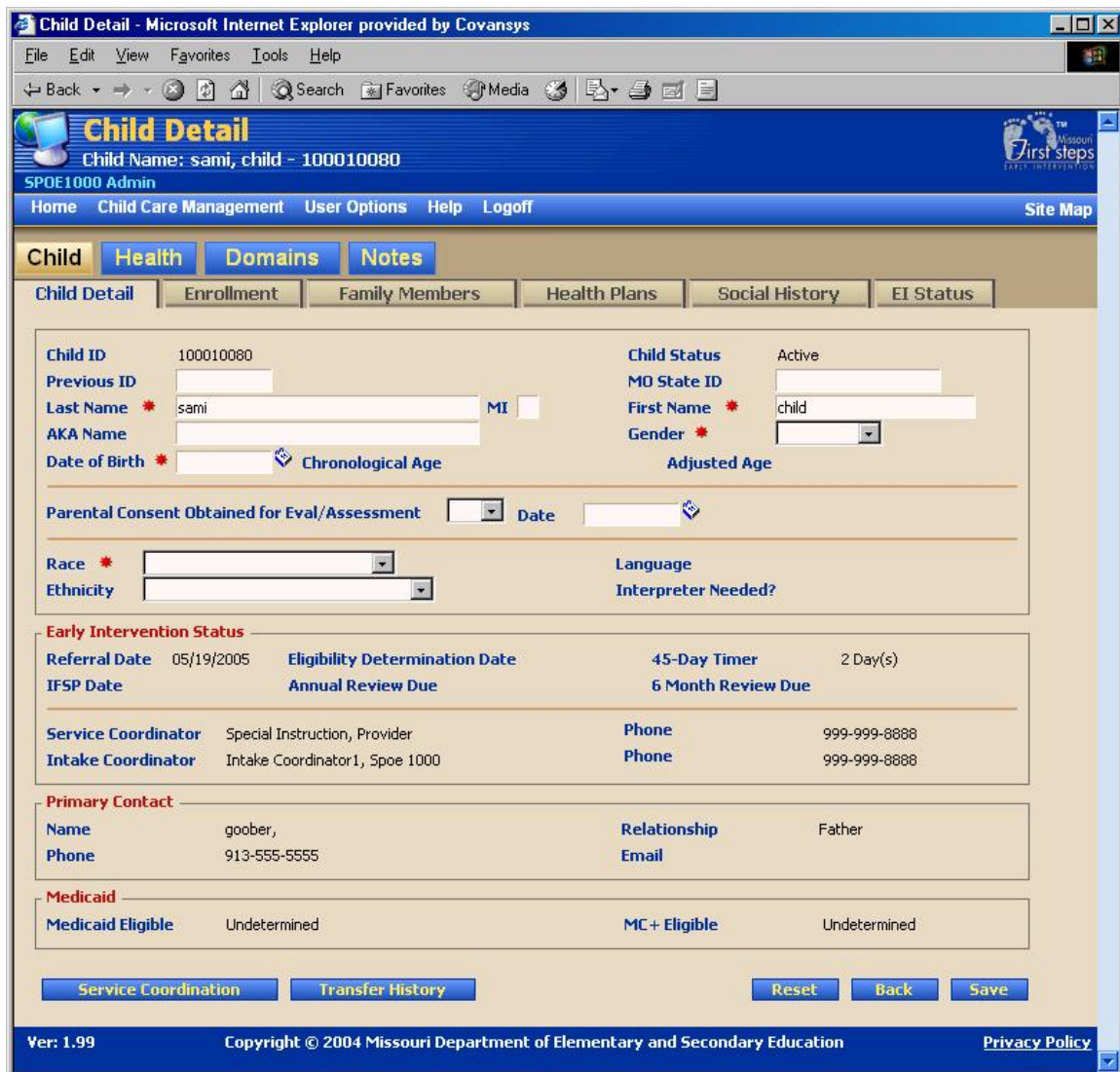
Family Member Information

View the Family Member List

Use this exercise to view a list of a child's family members.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Family Members** tab. The Family Members page displays.

Tip: Under **Search Filter**, you can select the **Show Active Only** check box to display only currently active family members in the **Family Member List** table. When the check box is selected or cleared, the information displayed in the **Family Member List** table is refreshed.

3. View the child's family members in the **Family Member List** table.

Note: Each active family member who is assigned the role of educational decision maker is highlighted in the **Family Member List** table.

Enter Information about a Family Member

Use this exercise to enter information about a family member.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Family Members** tab. The Family Members page displays.

3. Click **Add Member**. The Family Member Detail page displays.

4. Enter the family member's **Last Name**.

5. Enter the family member's middle initial in **MI**.

6. Enter the family member's **First Name**.

7. Enter or select the family member's **Birth Date**. You can click the ✎ icon to select a date from a calendar. This information is required only when the family member is a child.

8. Select the family member's **Relationship** to the child.

> **Tip:** Select the **Use HOH Address** check box to indicate that the family member resides at the same address as the head of the child's household. When **Save** is clicked, the **Address**, **City**, **State**, **Zip**, and **County** fields are automatically filled in with the information stored for the active family member who has been assigned the role of **Head of Household**. If an active head of household does not exist, selecting the check box has no effect.

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9. Enter the street **Address** at which the family member resides.

10. Enter the **ZIP** code for the postal zone in which the family member is resides. When a valid ZIP code is entered, **City** and **State** are automatically updated. The ZIP code is required information for family members who are designated as Head of Household or Educational Decision Maker.

11. If the family member is the child, select the **County** (from County Search). If the family member is not a child, this information cannot be specified.

12. Enter the **Email** address used to contact the family member. A valid email address format must be entered.

13. Enter the **Home Phone** number used to contact the family member. This is required information if the family member is designated as the primary contact.

14. Enter the **Work Phone** number used to contact the family member.

15. Enter an alternate telephone number at which the family member can be reached in **Other Phone**.

16. Select the **Best Time to Call** the family member.

17. If the family member is a child, select the **School District** (from School District Search). If the family member is not a child, this information cannot be specified.

18. Enter the family member's social security number in **SS#**.

19. Select the family member's **Education** level.

20. Select the **Language** primarily spoken by the family member. This is required information for family members who are designated as Head of Household or Educational Decision Maker.

21. Select the **Yes** or **No** radio button in **Interpreter Needed** to indicate whether the family member requires an interpreter. This is required information for family members who are designated as Head of Household or Educational Decision Maker.

22. Enter the primary way in which the family member communicates in **Primary Mode of Communication**.

23. Select the **Yes** or **No** radio button to indicate whether the family member is **Employed**.

24. Enter the name of the family member's employer in **Employer Name**.

25. Select the **Yes** or **No** radio button to indicate whether the family member is **Paying Child Care**

26. Enter or select the date on which the individual became a member of the family in **Member Effective Date**. You can click the ✥ icon to select a date from a calendar.

Note: Entering or selecting a **Member End Date** and clicking **Save** will inactivate the family member. Once a family member has been inactivated, no changes can be made to the family member's record, and the family member's record cannot be reactivated.
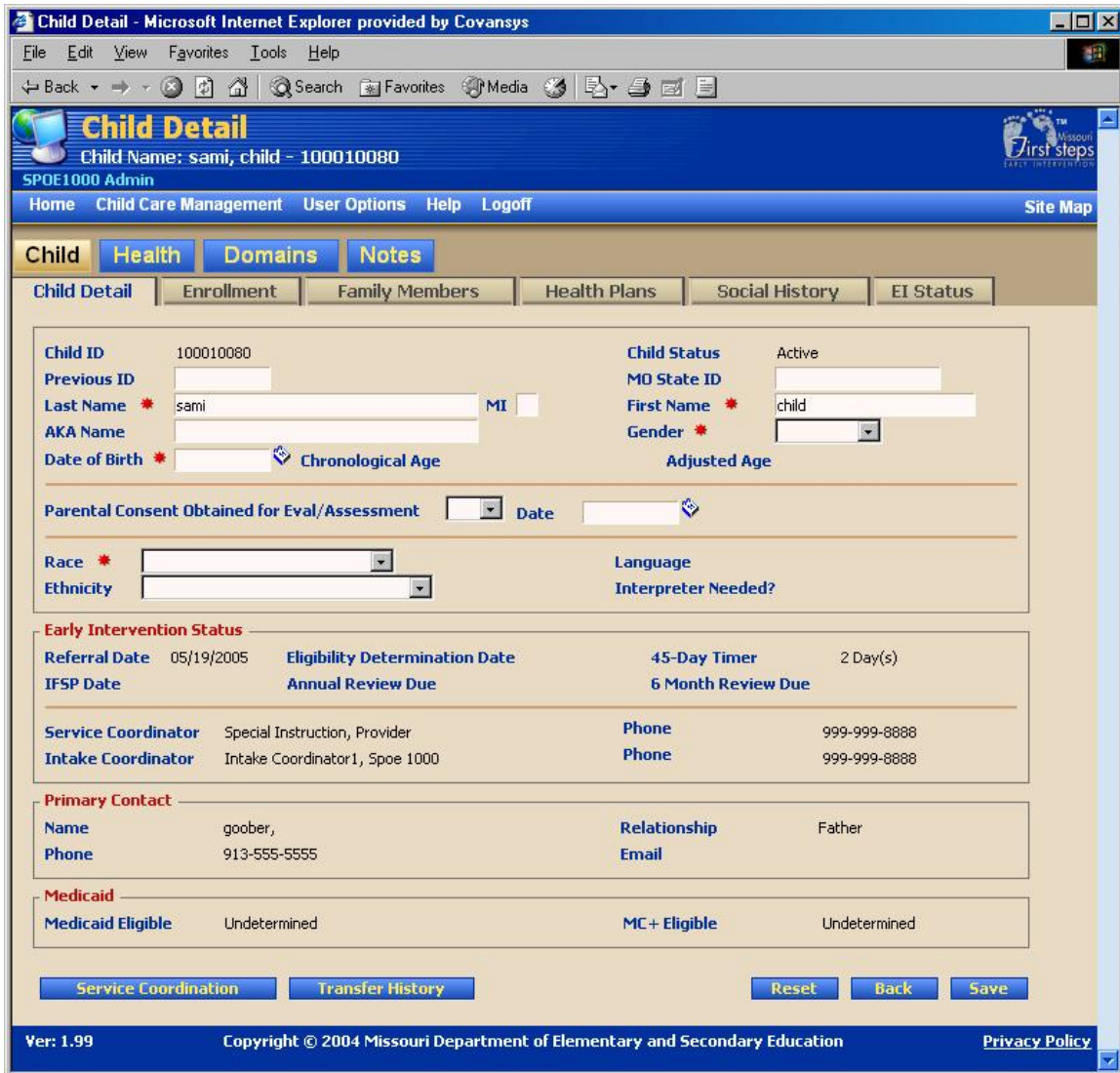
27. Click **Save**.

Specify a Family Member's Role in a Family

Use this exercise to specify a family member's role in a family.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Family Members** tab. The Family Members page displays.

Tip: Under **Search Filter**, you can clear the **Show Active Only** check box to display both active and inactive family member records in the **Family Member List** table. When the check box is selected or cleared, the information displayed in the **Family Member List** table is refreshed.

3. Click the 🔍 icon in the **Detail** column for a specific family member. The Family Member Detail page displays.

Note: Each active family member who is assigned the role of **Educational Decision Maker** is highlighted in the **Family Member List** table.

4. Click **Family Member Role**. The Family Member Role page displays.

5. Under **Family Member's Current Role**, select one or more of the following check boxes to indicate the family member's role(s) within the family:

   - Head of Household

   - Educational Decision Maker

   - Primary Contact

   - Household Member

Note: A family member can have multiple roles. Both the role of **Head of Household** and the role of **Primary Contact** must be assigned to at least one family member associated with the child at all times. In addition, neither the role of **Head of Household** nor the role of **Primary Contact** can be assigned to more than one family member at a given time. The **Head of Household** and **Primary Contact** roles are removed by the system from the existing family member when a new family member is assigned the role. An end date is added to the **Head of Household** role assignment that is minus one day of the new role assignment for the family member. You must have all required information entered and saved before that family member can be assigned as Head of Household or Educational Decision Maker.

6. Click **Save**.

End a Family Member's Record

Use this exercise to end a family member's record.

> ✎**Note:** Once a family member has been inactivated, no changes can be made to the family member's record, and the family member's record cannot be reactivated.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Family Members** tab. The Family Members page displays.

Tip: Under **Search Filter**, you can clear the **Show Active Only** check box to display both active and inactive family member records in the **Family Member List** table. When the check box is selected or cleared, the information displayed in the **Family Member List** table is refreshed.

3. Click the 🔍 icon in the **Detail** column for a specific family member. The Family Member Detail page displays.

Note: Each active family member who is assigned the role of **Educational Decision Maker** is highlighted in the **Family Member List** table.

4. Enter or select the date on which to end the family member's record in **Member End Date**. You can click the ⍟ icon to select a date from a calendar.

Note: A **Member End Date** cannot be entered for a family member who is currently assigned the role of **Head of Household**. If you need to end the record for a family member's who is currently designated as the **Head of Household**, you must first remove the **Head of Household** role from the family member and assign a new **Head of Household** within the family.
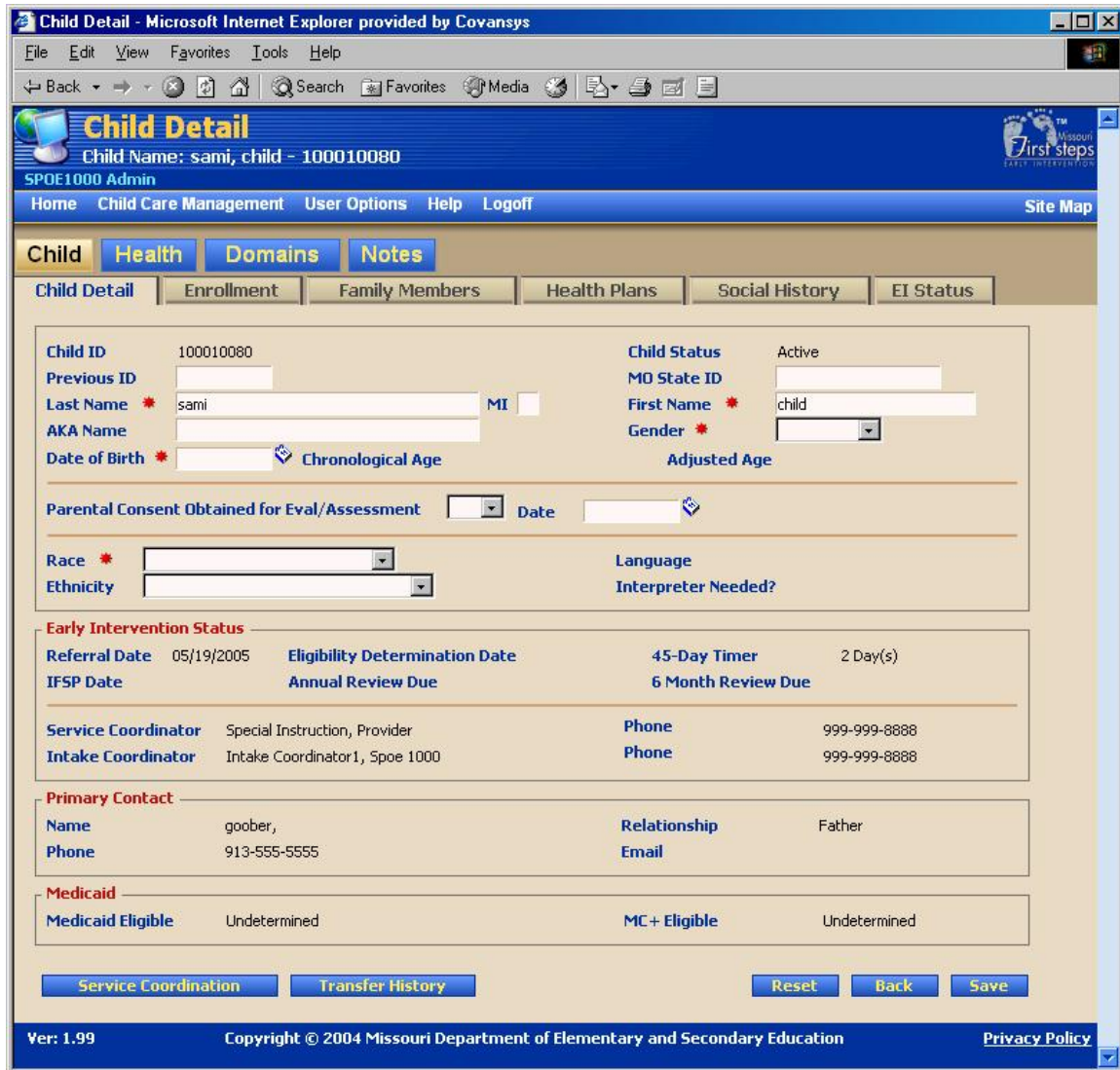
5. Click **Save**.

Enter a Family Member's Income

Use this exercise to enter a family member's income information from the [Family Member Detail](#) page.

Complete the following steps to finish this exercise:

1. On the [Child List](#) page, click the 🔎 icon in the **Detail** column for a specific child record. The [Child Detail](#) page displays.

2. Click the **Family Members** tab. The [Family Members](#) page displays.

Tip: Under **Search Filter**, you can clear the **Show Active Only** check box to display both active and inactive family member records in the **Family Member List** table. When the check box is selected or cleared, the information displayed in the **Family Member List** table is refreshed.

3. In the columns of the **Family Member List** table, view the following information for each family member:

- Detail
- Last Name
- First Name
- Member Role
- Relationship
- Status

Note: Each family member who has been assigned the role of educational decision maker is highlighted in the **Family Member List** table.

4. Click the icon in the **Detail** column for a specific family member. The Family Member Detail page displays.

5. Click **Add Member Income**. The Income Detail page displays.

6. Enter or select the date on which the family member began earning the income in **Effective Date**. The default is today's date. You can click the ❖ icon to select a date from a calendar. The date specified must be equal to or greater than the family member's effective date. Dates in the past are accepted.

✎**Note:** Entering or selecting an **End Date** and clicking **Save** will inactivate the income record. Once an income record has been inactivated, no changes can be made to the income record, and the income record cannot be reactivated.

7. In the columns of the **Income** table, complete the following information for the applicable income type(s):

- Amount
- How Often

✎**Note: Monthly**, **Yearly**, and **Annual** are calculated automatically by the system based on the **Amount** and **How Often** specified..
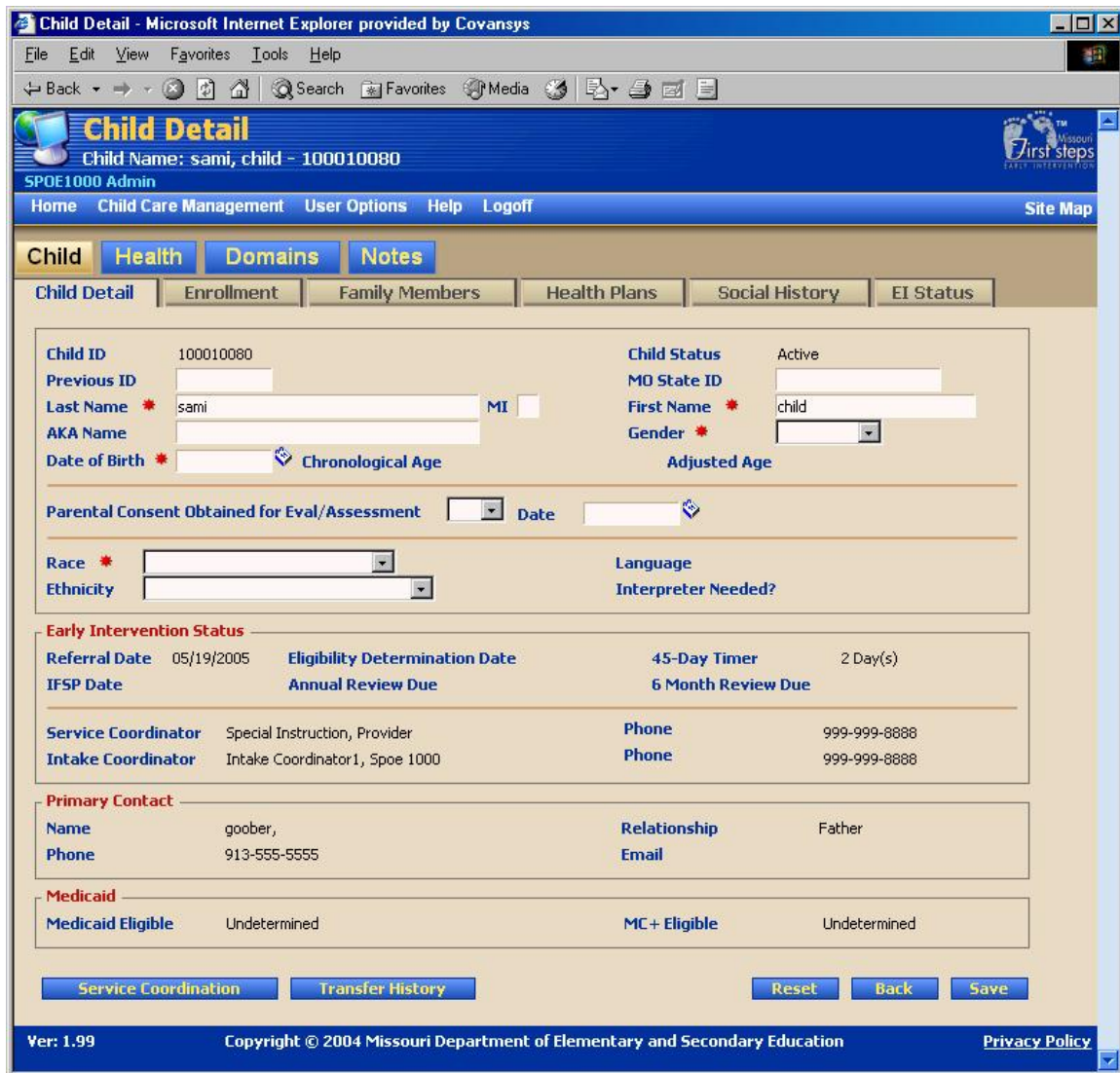
8. Click **Save**.

View a Family Income List

Use this exercise to view a list of incomes for a family.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Family Members** tab. The Family Members page displays.

3. Click **Family Income**. The Family Income page displays.

4. View the list of family members' income records in the **Family Income** table.

Tip: You can click the 🔍 icon in the **Detail** column to display detailed income information. The Income Detail page displays when clicked.

End a Family Member's Income Record

Use this exercise to end a family member's income record from the Family Income page.

> ✎**Note:** Once an income record has been inactivated, no changes can be made to the income record, and the income record cannot be reactivated.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Family Members** tab. The Family Members page displays.

3. Click **Family Income**. The Family Income page displays.

4. In the columns of the **Family Income** table, view the following information for each income record:

- Detail
- Last Name
- First Name
- Effective Date
- End Date
- Annual Income

5. Click the 🔍 icon in the **Detail** column for a specific income record. The Income Detail page displays.
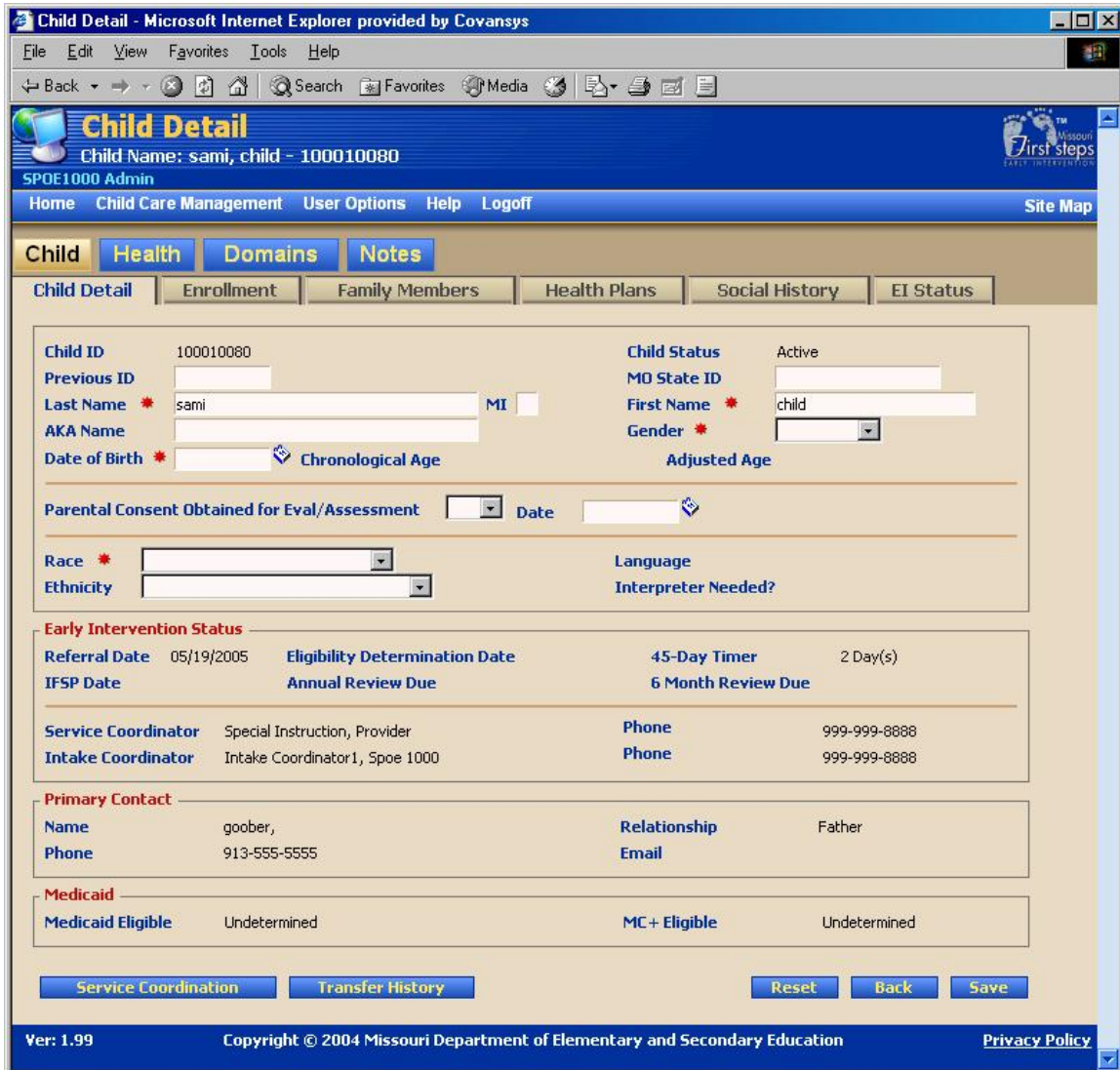
6. Enter or select the date on which the family member ceased to earn the income in **End Date**. You can click the 🖘 icon to select a date from a calendar.

7. Click **Save**.

Transfer a Child's Record to a Different Household from Family Member Detail

Use this exercise to transfer a child's record to a different household from the Family Member Detail page.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Family Members** tab. The Family Members page displays.

Tip: Under **Search Filter**, you can clear the **Show Active Only** check box to display both active and inactive family member records in the **Family Member List** table. When the check box is selected or cleared, the information displayed in the **Family Member List** table is refreshed.

3. click the 🔍 icon in the **Detail** column for the child in the **Family Member List** table. The Family Member Detail page displays. You must click on the 🔍 icon for the child to have access to the Household Transfers option.

4. Click **Household Transfers**. The Household Transfer page displays.

5. Click the 🔍 icon displayed to the right of the **Household ID**. The
   Household ID Search page displays.

6. Select the appropriate radio button and enter filter criteria in the following fields as necessary to perform a search:

- Last Name (a minimum of 2 characters must be entered)

- First Name

- Household ID (a complete ID must be entered)

- Phone

7. Click **Search** to perform a search based on the specified filter criteria. The information displayed in the **Household List** table is refreshed.

8. In the **Household List** table, click the link in the **Select** column to specify the household to which you want to transfer the child's record. The Household Transfer page displays.

9. Click **Save**.

Health Plan Information

View the Health Plan List

Use this exercise to view a list of health plans in which a family has enrolled.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Health Plans** tab. The Health Plans page displays.

3. View the list of health plans in the **Health Plan List** table.

Tip: You can click the 🔍 icon in the **Detail** column to view detailed health plan information. The page that displays is based on the type of health plan selected.

Enter Health Insurance for a Family Member

Use this exercise to enter health insurance for a family member.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Health Plans** tab. The Health Plans page displays.

3. Click **Add Insurance**. The Health Insurance page displays.

4. In **Insurance Carrier Name**, enter at minimum the first 2 characters of the insurance carrier's name. You can enter more than 2 characters as necessary.

5. Click **Search**. The **Insurance Carrier List** table refreshes and displays the carriers that meet the search criteria entered in **Insurance Carrier Name**.

6. In the **Insurance Carrier List** table, click link in the **Select** column to indicate the name of the insurance carrier. The page refreshes to display specific information about the carrier selected.

7. Select the **Insurance Type**.

8. Select the **Insured's Name**.

9. Enter the identification number for the insurance policy in **Policy/Member ID Number**.

> ✍**Note:** Once **Save** is clicked, the **Policy/Member ID Number** cannot be updated.

10. Enter the name of the entity through which the family member got the insurance policy in **Group Name**.

11. Enter the identification number of the entity through which the family member got the insurance policy in **Group #**.

12. Select the order in which the insurance policy is billed in **Policy Billing Order**.

13. Enter or select the date on which the insurance coverage begins in **Date**. You can click the ✦ icon to select a date from a calendar. Dates in the past are accepted.

> ✍**Note:** Entering or selecting an end date in **To** and clicking **Save** will inactivate the insurance policy record. Once an insurance policy record has been inactivated, no changes can be made to the insurance policy record, and the insurance policy record cannot be reactivated.

14. Select the **ERISA** (Employee Retirement Income Security Act) status.

> 💡**Tip:** Ask the participant if their private insurance is an ERISA plan. If this information is unknown, please mark the status as non-ERISA. ERISA is the Employee Retirement Income Security Act of 1974, or a Federal law that establishes legal guidelines for private pension plan administration and investment practices. ERISA is a major U.S. law that guarantees certain categories of employees a pension provided by their employer after a certain period of employment.

15. Click **Save**.

Enter Medicaid Information for a Family Member

Use this exercise to enter Medicaid information for a family member.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Health Plans** tab. The Health Plans page displays.

3. Click **Add Medicaid**. The Medicaid Information page displays.

4. Select one of the following options for **Medicaid Eligibility Checked?**:

- Yes
- No
- Declined

6. Select one of the following options for **Medicaid Eligible?**:

- Yes
- No
- Unknown

7. Select one of the following options for **MRDD Enrolled?**:

- Yes
- No
- Declined

8. Select one of the following options for **BSHCN Enrolled?**:

- Yes
- No
- Declined

9. Select one of the following options for **Medicaid Enrolled?**:

- Yes
- No
- Unknown

10. Enter the **Medicaid/DCN Number**.

11. Enter or select the date on which the insurance coverage begins in **Effective Dates**. You can click the 🖐 icon to select a date from a calendar. Dates in the past are accepted.

> ✍**Note:** Entering or selecting an end date in **To** and clicking **Save** will inactivate the insurance policy record. Once an insurance policy record has been inactivated, no changes can be made to the insurance policy record, and the insurance policy record cannot be reactivated.
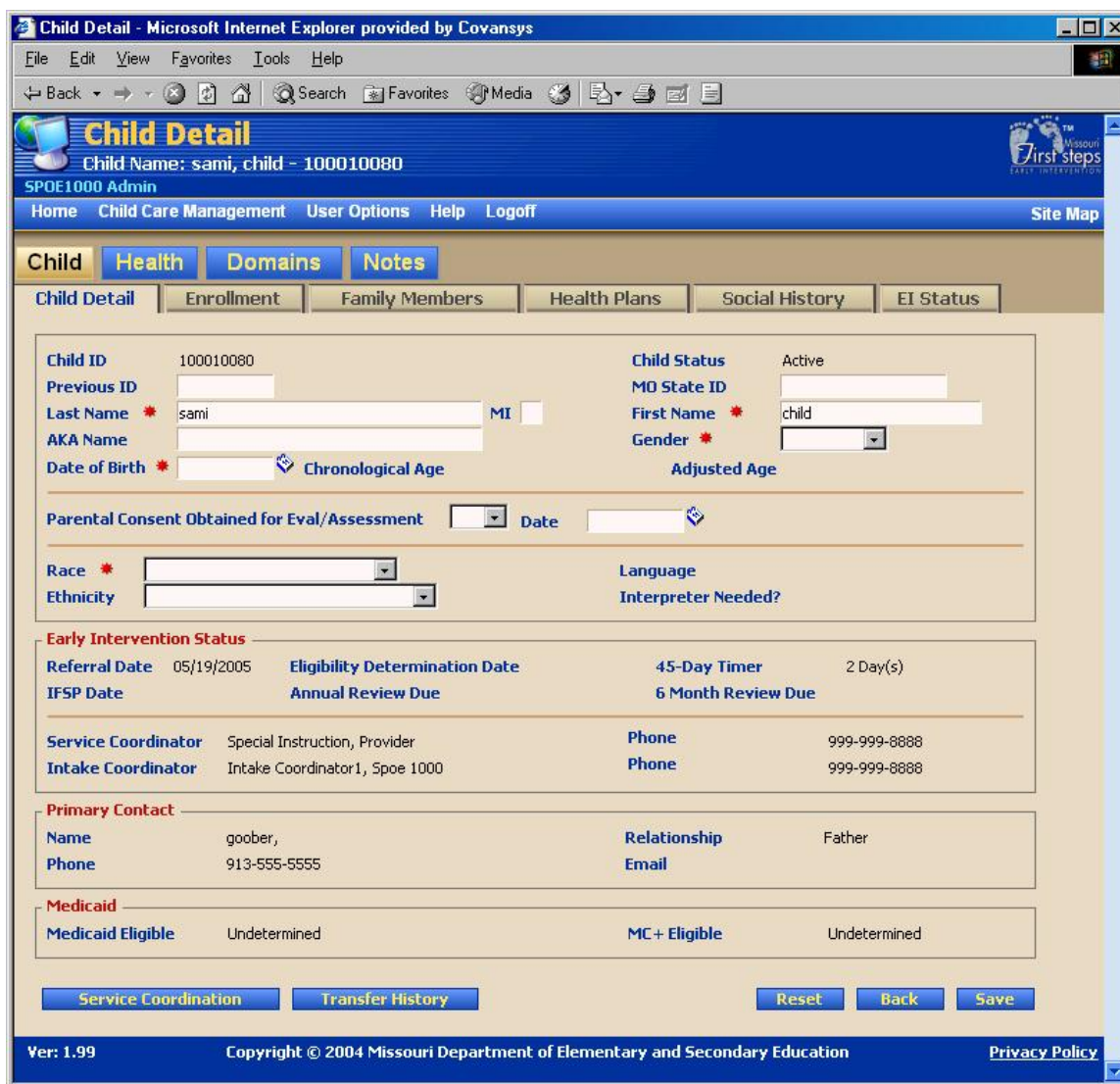
12. Select one of the following options for **Parent/Guardian Accepted Assistance for Enrollment**:

- Yes
- No

13. Click **Save**.

Enter MC+ Information for a Family Member

Use this exercise to enter MC+ information for a family member.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Health Plans** tab. The Health Plans page displays.

3. Click **Add MC+**. The MC+ Information page displays.

4. Select one of the following options from **MC+ Eligible?**:

    - Yes

    - No

    - Declined

6. Select one of the following options from **MC+ Enrolled?**:

    - Yes

    - No

    - Unknown

7. Enter an **MC+ ID Number**.

8. Enter or select the date on which the insurance coverage begins in **Date**. You can click the 🖐 icon to select a date from a calendar. Dates in the past are accepted.

> ✏**Note:** Entering or selecting an end date in **To** and clicking **Save** will inactivate the insurance policy record. Once an insurance policy record has been inactivated, no changes can be made to the insurance policy record, and the insurance policy record cannot be reactivated.

9. Under **Case Manager Contact Information**, complete the following information:

    - Last Name

    - MI

    - First Name

    - Address

    - ZIP

    - Phone

    - Fax

    - Email

> 💡**Tip:** Once a **ZIP** code is entered, the **City** and **State** are automatically displayed as read-only information.

10. Click **Save**.

Social History Information

Enter the Social History Interview Date

Use this exercise to enter the social history interview date.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Social History** tab. The Social History page displays.

3. Click the **Review of Referral with Family** link. The Review of Referral with Family page displays.

4. Enter or select the **Social History Interview Date**. You can click the icon to select a date from a calendar.

5. In **Review of Referral with Family**, enter specific information discussed during the review of the referral with the family.

6. Click **Save**.

Enter Neonatal Information from Social History

Use this exercise to enter detailed neonatal information about a child from the Social History page.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Social History** tab. The Social History page displays.

3. Click the **Neonatal** link. The Neonatal Detail page displays.

4. Enter or select the child's **Actual Due Date**.

5. Enter the child's **Gestational Age**. If a NICU referral exists, default information is displayed.

6. Enter the child's **Place of Birth**.

7. Enter the child's **Birth Weight (Grams)**. If a NICU referral exists, default information is displayed.

8. Enter the number of days the child spent in the hospital after delivery in **Newborn Hospital Stay**.

9. Complete the following information under **NICU Information** as necessary (if a NICU referral exists, default information is displayed):

   - Select the **Medical condition associated with Mental Retardation/Developmental Disability exists** check box to

indicate the child has a medical condition associated with Mental Retardation/Developmental Disability.

- Select the **Very low birth weight AND one or more of the following conditions exist** check box to indicate that the child had a very low birth weight. If the check box is selected, one or more of the following check boxes must be selected:

    - Select the **Intra-cranial Bleeds (Grade II, III, IV)** check box to indicate that the child suffered intra-cranial bleeds of an indicated grade.

    - Select the **Apgar of 6 or less** check box to indicate that the child was given a score of 6 or less on the Apgar assessment.

    - Select the **Ventilator or CPAP dependent for 72 hours or more** check box to indicate that the child received assistance in breathing.

    - Select the **Asphyxiation** check box to indicate that the child suffered from asphyxiation.

- Select the child's **ICD9** code by clicking the 🔎 icon and selecting an ICD9 code from the **Diagnosis List** that displays.

- Enter the **Reasons** the child was referred to the program in 250 characters or less.

10. Enter any pertinent health information or areas of concern or medications in **List any Pertinent Health Information or Areas of Concern or Medications** in 250 characters or less.

11. Enter the name of the individual who provided the child's neonatal information in **Information Obtained from** in 20 characters or less.

12. Enter the relationship that the individual who provided the neonatal information has with the child in **Relationship to Child** in 20 characters or less.

13. Click **Save**.

Enter a Physician Record from Social History

Use this exercise to enter information about a physician from the Social History page.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Social History** tab. The Social History page displays.

3. Click the **Physicians Seen in the Last 12 Months** link. The Physician List page displays.

4. Click **Add Physician**. The Medical-Physician Detail page displays.

5. Select a **Physician Type**.

6. Enter the **Hospital** name.

7. Enter the **Physician Name** in 65 characters or less.

8. Enter the street **Address** of the physician's practice.

9. Enter the **ZIP** code for the postal zone in which the physician's practice is located.

> **Tip:** Once a **ZIP** code is entered, the **City** and **State** are automatically displayed as read-only information.
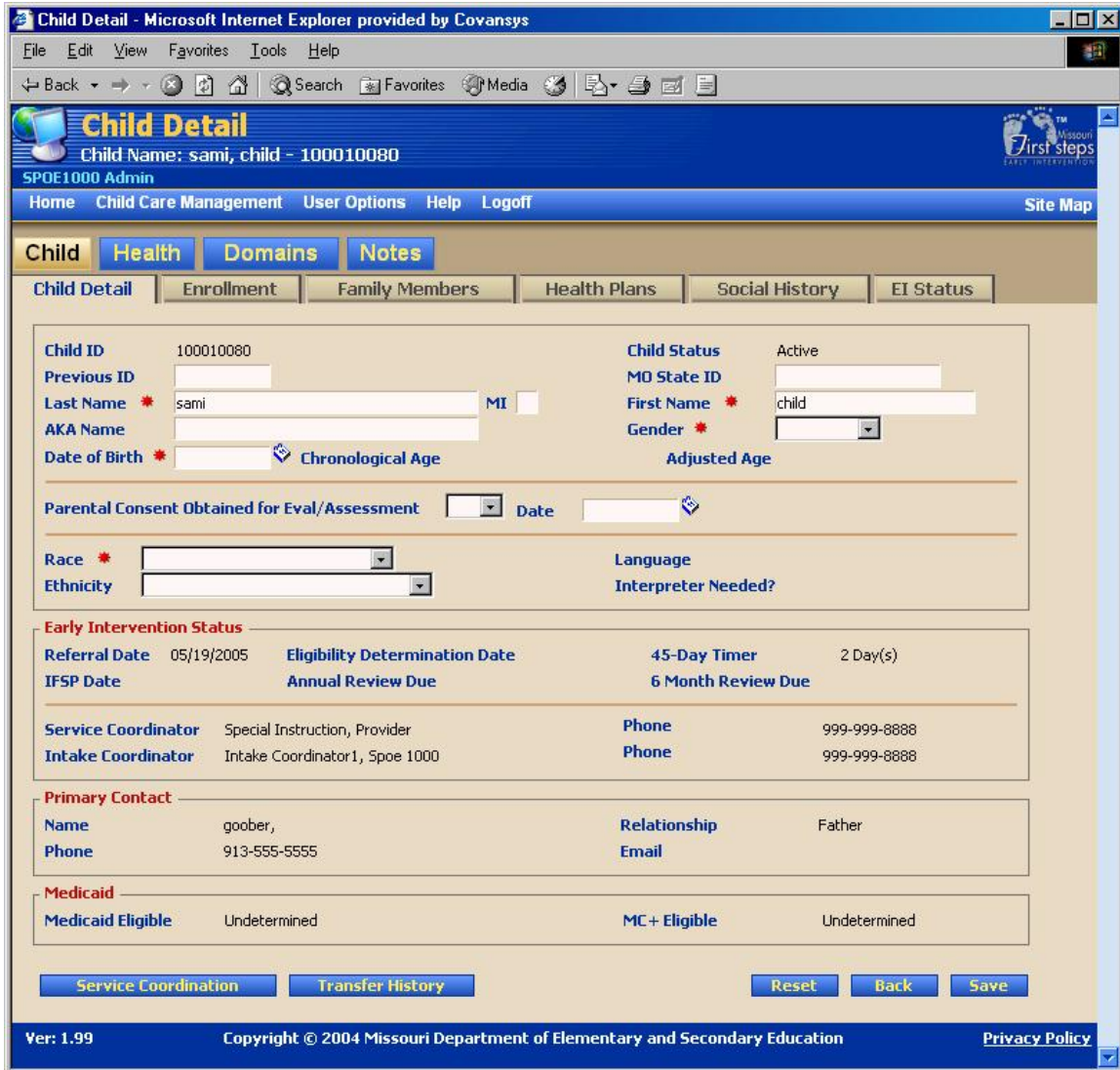
10. Enter the physician's **Phone** number.

11. Enter the physician's **Fax** number.

12. Enter or select the date on which the child last visited the physician in **Date Last Seen**. You can click the 🗓 icon to select a date from a calendar.

13. Enter the number of times that the child has visited the physician in **# of Visits**.

14. Enter the reason for the child's last visit to the physician in **Reason for Visit**.

15. Click **Save**.

Enter Health Summary Information from Social History

Use this exercise to enter a child's current health information from the Social History page.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Social History** tab. The Social History page displays.

3. Click the **Health Summary** link. The Current Health page displays.

4. Click **Update Health Summary**. The Update Health Summary page displays.

5. In **Date**, enter or select the date on which the health summary is being recorded. You can click the 📝 icon to select a date from a calendar.

6. In **Concerns/Diagnosis/Illnesses**, enter text describing a concern, diagnosis, or illness for the child.

7. In **Hospitalization/Surgeries**, enter text describing any hospitalizations or surgeries for the child.

8. In **Physician Name**, enter the name of the diagnosing physician.

9. In **Last Visit Date**, enter or select the date on which the child last visited the diagnosing physician. You can click the icon to select a date from a calendar.

10. Click **Save**.

Enter an Equipment/Supplies Record from Social History

Use this exercise to enter a information about equipment and supplies used by a child from the Social History page.

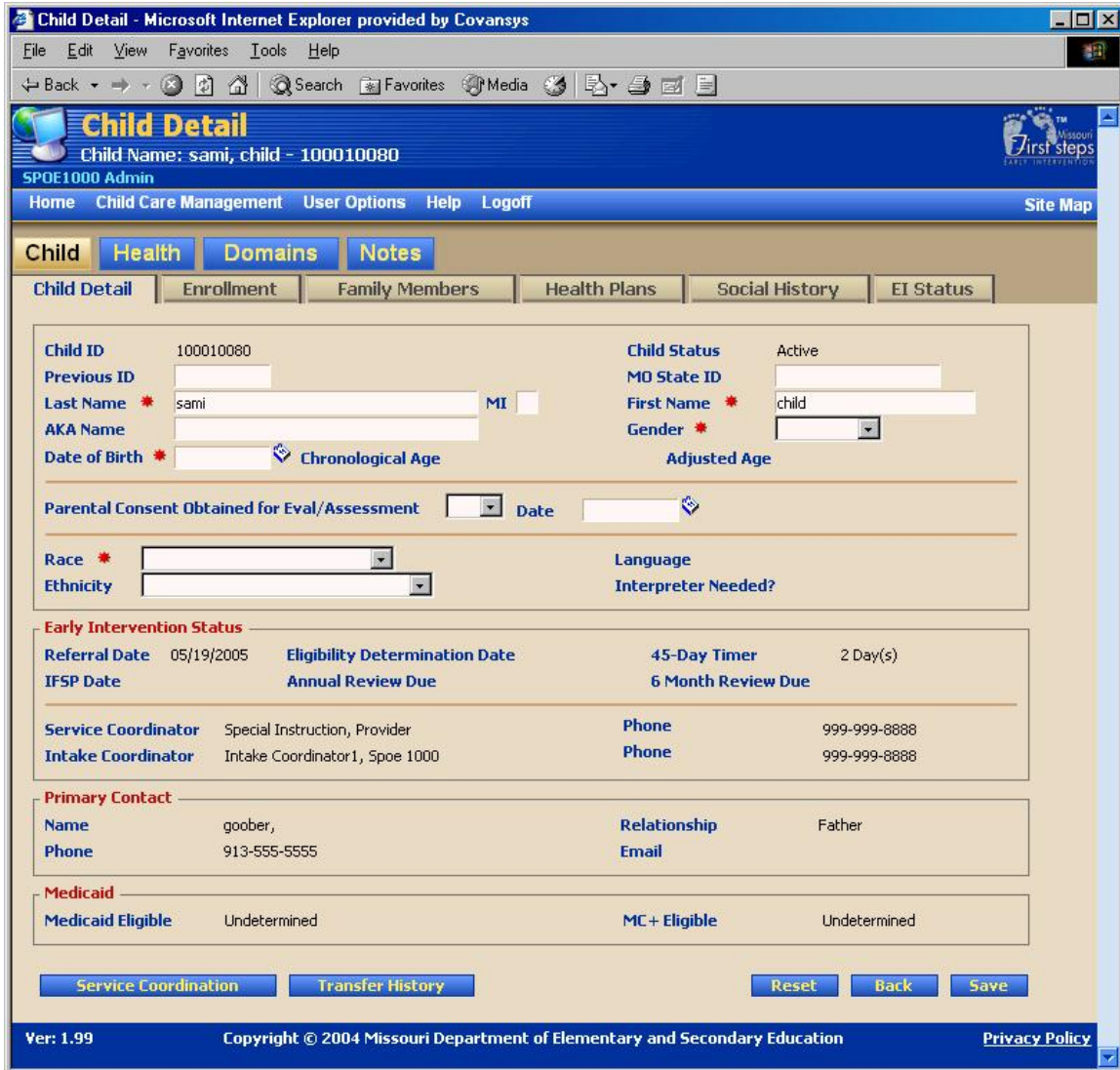*Complete the following steps to finish this exercise:*

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Social History** tab. The Social History page displays.

3. Click the **Medication/Equipment/Supplies** link. The Medical/Equipment Supply List page displays.

4. Click **Add Equipment/Supplies**. The Equipment/Supplies Detail page displays.

5. Select the **Equipment/Supplies**.

Note: If **Other** is selected for **Equipment/Supplies**, you are required to enter a description of the equipment in **Other Description**.

6. Enter the name of the individual who provides the equipment in **Who Provides**.

7. Enter the name of the individual who pays for the equipment in **Who Pays**.

8. Enter or select the date on which the child started using the equipment in **Start Date**. You can click the icon to select a date from a calendar. The date entered cannot be greater than today's date or less than the child's date of birth.

Note: Entering or selecting an **End Date** and clicking **Save** will inactivate the equipment/supplies record. Once an equipment/supplies record has been inactivated, no changes can be made to the equipment/supplies record, and the equipment/supplies record cannot be reactivated.

9. Click **Save**.

Enter a Medication Record from Social History

Use this exercise to enter a information about a medication taken by a child from the Social History page.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Social History** tab. The Social History page displays.

3. Click the **Medication/Equipment/Supplies** link. The Medical/Equipment Supply List page displays.

4. Click **Add Medication**. The Medication Detail page displays.

5. Enter the name of the **Medication**.

6. Select the **Route** by which the child receives the medication.

7. Enter the **Purpose** of the medication.

8. Enter or select the date on which the child started receiving the medication in **Start Date**. You can click the ⬚ icon to select a date from a calendar. The date entered cannot be greater than today's date or less than the child's date of birth.

> ✍**Note:** Entering or selecting an **End Date** and clicking **Save** will inactivate the medication record. Once a medication record has been inactivated, no changes can be made to the medication record, and the medication record cannot be reactivated.
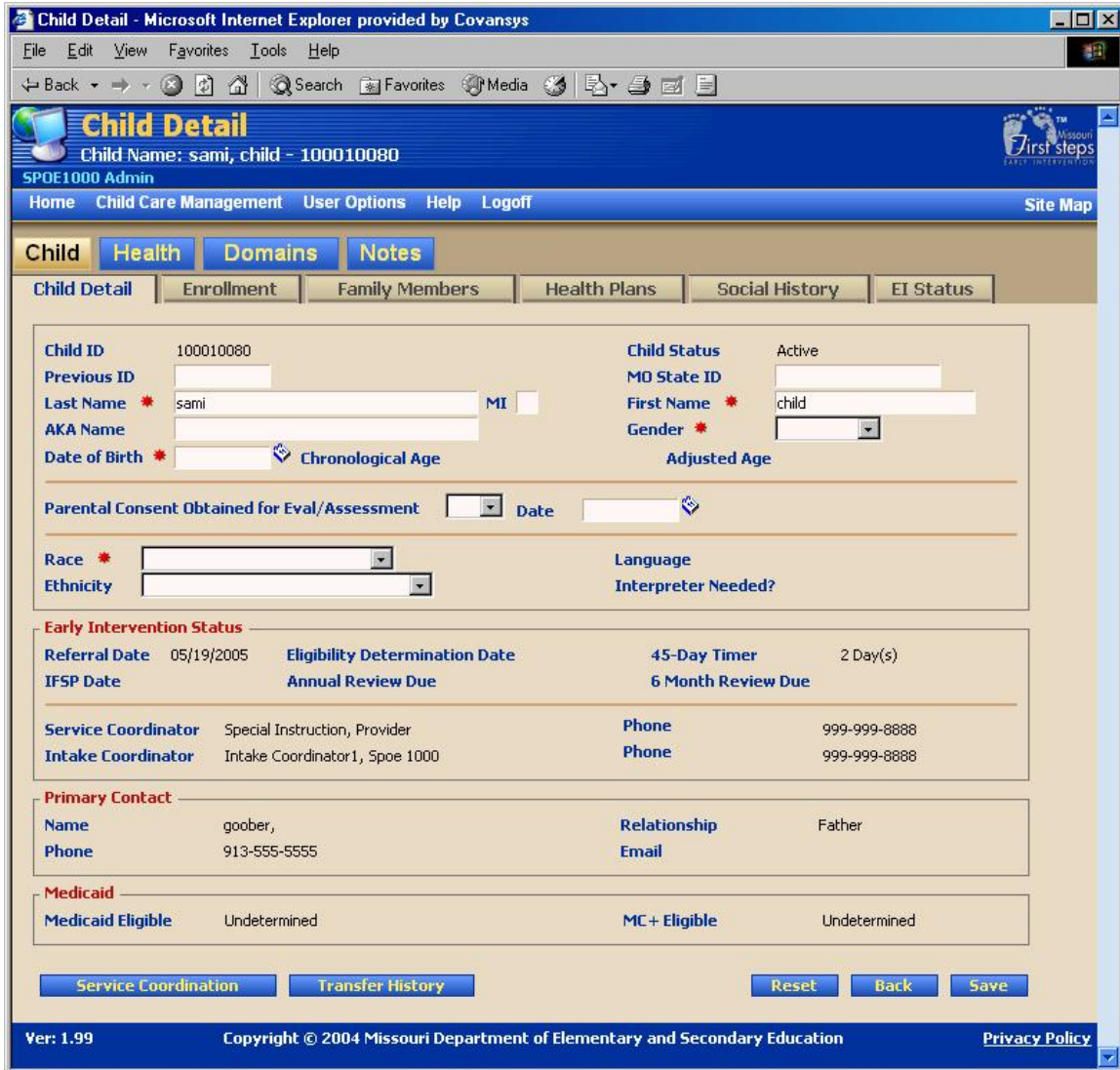
9. Click **Save**.

Enter an Immunization Record from Social History

Use this exercise to record an immunization that a child has received from the Social History page.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Social History** tab. The Social History page displays.

3. Click the **Immunizations** link. The Immunization List page displays.

4. Click **Add Immunization**. The Immunization Detail page displays.
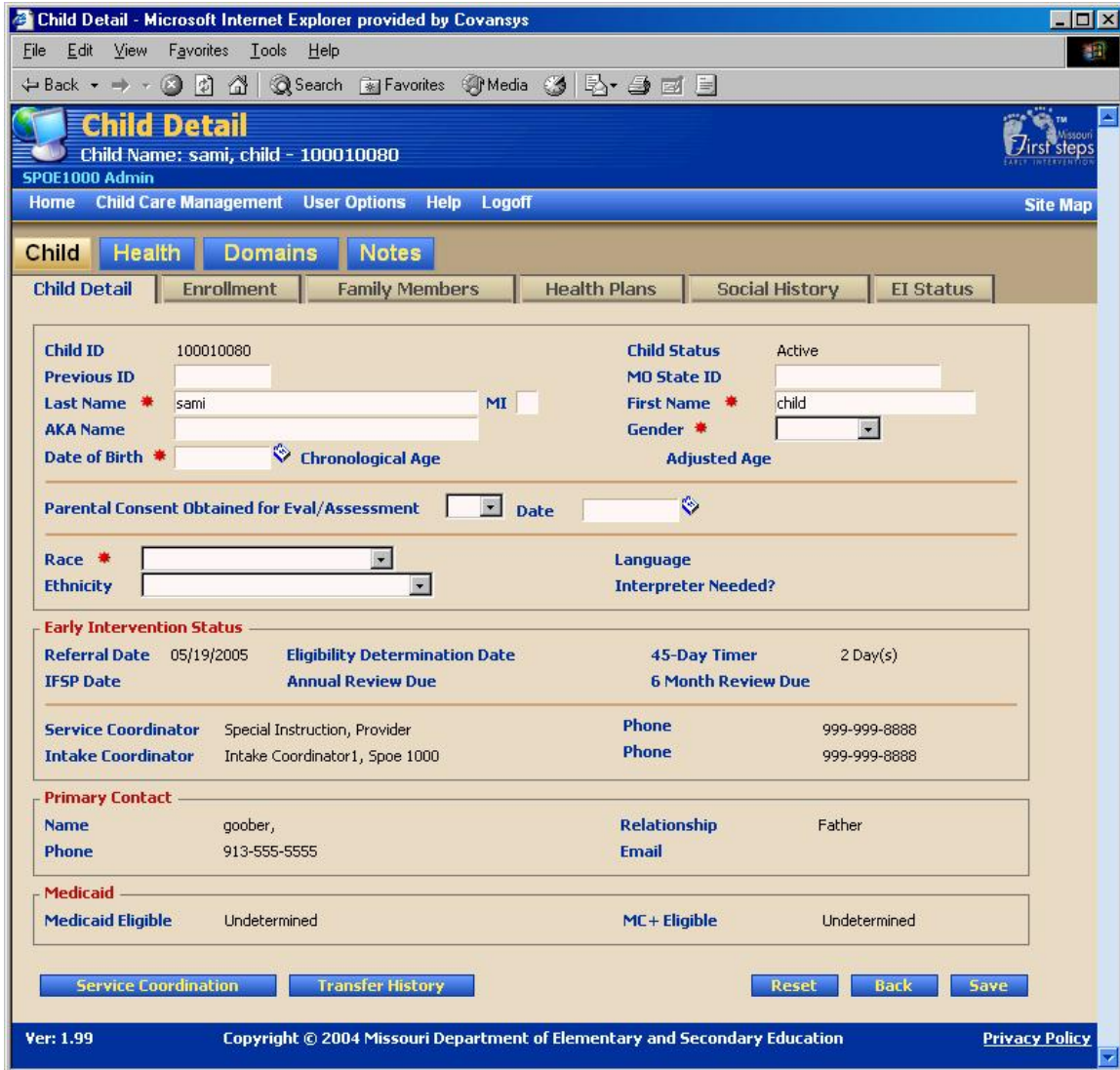
5. In **Immunization**, select the immunization received by the child.

6. In **Date**, enter or select the date on which the child received the immunization. You can click the 🖉 icon to select a date from a calendar.

7. Select the **Immunization up to date** check box to indicate that the child's immunization is up to date.

8. Click **Save**.

Enter a Developmental Milestone from Social History

Use this exercise to enter a developmental milestone for a child from the Social History page.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Social History** tab. The Social History page displays.

3. Click the **Development Milestones** link. The Developmental History page displays.

4. Click **Add Developmental Milestone**. The <u>Developmental Milestones</u> page displays.

5. Select a **Skill Type**. The **Skills List** table will refresh to display skills of the selected type.

6. Select a check box in the **Select** column of the **Skills List** table to indicate that a specific skill has been acquired by the child. More than one skill can be selected. If the child has acquired none of the skills listed, you can skip this step.

7. Select the **Yes** or **No** radio button in **Is this an Area of Concern?** to indicate that certain concerns surround the selected skill(s).

8. In **Comment**, enter any comments about the selected skill(s) in 250 characters or less.

9. Click **Save**.

E. I. Status Overview

The EI Status page displays the current status of a child's record and which program data requirements have been met as of the current date. This information is displayed in the **Child EI Status** table. The E.I. status is initiated with each new enrollment period and is reflective of the child's current status in the system's enrollment process. As required data elements are completed, the child's record progresses through each of the E.I. statuses. The E.I. status is used to designate which pages are available for data entry in a child's record.

Referral Status

The child's record is in *Referral* status from the time the referral is accepted into the database until the initial parental consent edits are passed.

IPC Status

The child's record is in Initial Parental Consent, or *IPC* status after the parental consent is obtained and the edits are passed. If the user selects to run the edits, the child's record is checked for various data elements. If the data edits are passed successfully, the status is updated to *IPC*. In *IPC* status, the **Eligibility** tab and related pages are available to the user. If parental consent is denied, the edits are run but the status is not updated. The user must end the enrollment period for the record.

Eligibility Status

The record is updated to *Eligibility* status when the Eligibility edits are passed successfully and the record is marked as eligible. In *Eligibility* status, the **Team Meetings** and **IFSP** tabs and related pages are available to the user. If the child is determined to be not eligible and the edits are run, the child's enrollment period is ended by the system as not eligible.

IFSP Status
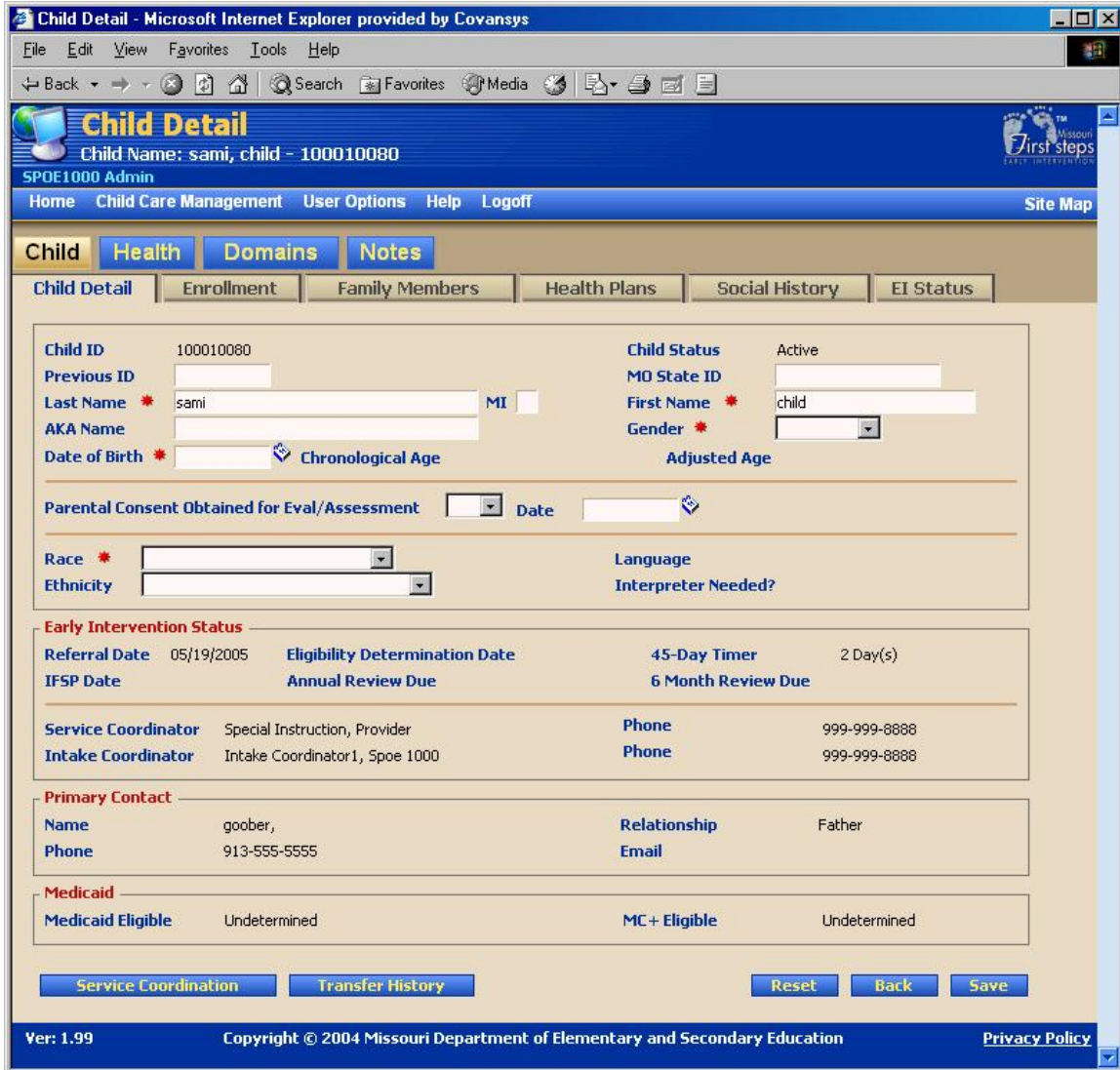
The IFSP status begins when the *Initial* team meeting is finalized and the team meeting edits are passed successfully. The record remains in *IFSP* status until the enrollment period is ended. The status is not updated again unless the child re-enters the system in a new enrollment period.

View a Child's E.I. Status

Use this exercise to see how to view a child's E.I. status.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **E.I. Status** tab. The Child E.I. Status page displays.

3. In the **Child EI Status** table, view the child's E.I. status information. The following icons are displayed in the **Status** column:

> The **Referral Accepted** icon indicates that the referral was accepted for initial parental consent and eligibility determination.

> The **Need Edits Run** icon indicates that program edits need to be run and that a team meeting is in Ongoing status.

> The **Data is Required** icon indicates that more data is needed or required in a specific area.

> The **Scheduled** icon indicates that a team meeting is in Scheduled status.

Current Health Information

View a Child's Current Health Summary Information

Use this exercise to see how to view a child's most current health summary information.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Health** tab. The Current Health page displays.

3. The child's most current health information is displayed on this page. Under **Current Health Summary**, view the following information:

- **Concerns/Illnesses** displays text describing a concern, diagnosis, or illness for the child.

- **Hospitalization/Surgeries** displays text describing any hospitalizations or surgeries for the child.

- **Physician Name** displays the name of the diagnosing physician.

- **Last Visit Date** displays the date on which the child last visited the diagnosing physician.

Tip: You can click **Update Health Summary** to update the health summary information displayed, or click **Health History** to view a history of health summaries for the child.

View the Medical/Equipment Supply List

Use this exercise to see how to view a list of a medications, equipment, and supplies for a child.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔎 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Health** tab. The Current Health page displays.

3. Click the **Medication/Equipment/Supply** tab. The Medical/Equipment Supply List page displays.

4. View the list of medications, equipment, and supplies in the **Medical Equipment List** table.

> **Tip:** You can click the 🔍 icon in the **Detail** column to view detailed medication, equipment, or supplies information. The page that displays is based on the type of item selected.

View the Immunization List

Use this exercise to see how to view a list of immunizations that a child has received.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Health** tab. The Current Health page displays.

3. Click the **Immunizations** tab. The Immunization page displays.

4. View the list of immunizations that the child has received in the **Immunization List** table.

> **Tip:** You can click the 🔍 icon in the **Detail** column to view detailed immunization information. The Immunization Detail page displays when clicked.

View the Physician List

Use this exercise to see how to view a list of physicians that a child has visited.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Health** tab. The Current Health page displays.

3. Click the **Physician** tab. The Physician List page displays.

4. View the list of physicians that the child has visited in the **Physician List** table.

🔍**Tip:** You can click the 🔍 icon in the **Detail** column to view detailed physician information. The Physician Detail page displays when clicked.

View, Enter, or Update Neonatal Information

Use this exercise to see how to view, enter, or update detailed neonatal information about a child.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Health** tab. The Current Health page displays.

3. Click the **Neonatal** tab. The Neonatal Detail page displays.

4. Enter or select the child's **Actual Due Date**. You can click the ✋ icon to select a date from a calendar.

5. Enter the child's **Gestational Age**. If a NICU referral exists, default information is displayed.

6. Enter the child's **Place of Birth**.

7. Enter the child's **Birth Weight (Grams)**. If a NICU referral exists, default information is displayed.

8. Enter the number of days the child spent in the hospital after delivery in **Newborn Hospital Stay**.

9. Complete the following information under **NICU Information** as necessary (if a NICU referral exists, default information is displayed):

   - Select the **Medical condition associated with Mental Retardation/Developmental Disability exists** check box to indicate the child has a medical condition associated with Mental Retardation/Developmental Disability.

   - Select the **Very low birth weight AND one or more of the following conditions exist** check box to indicate that the child had

a very low birth weight. If the check box is selected, one or more of the following check boxes must be selected:

- Select the **Intra-cranial Bleeds (Grade II, III, IV)** check box to indicate that the child suffered intra-cranial bleeds of an indicated grade.

- Select the **Apgar of 6 or less** check box to indicate that the child was given a score of 6 or less on the Apgar assessment.

- Select the **Ventilator or CPAP dependent for 72 hours or more** check box to indicate that the child received assistance in breathing.

- Select the **Asphyxiation** check box to indicate that the child suffered from asphyxiation.

- Select the child's **ICD9** code by clicking the search icon and selecting an ICD9 code from the **Diagnosis List** that displays.

- Enter the **Reasons** the child was referred to the program in 250 characters or less.

10. Enter any pertinent health information or areas of concern or medications in **List any Pertinent Health Information or Areas of Concern or Medications** in 250 characters or less.

11. Enter the name of the individual who provided the child's neonatal information in **Information Obtained from** in 20 characters or less.

12. Enter the relationship that the individual who provided the neonatal information has with the child in **Relationship to Child** in 20 characters or less.

13. Click **Save**.

View the Diagnosis List

Use this exercise to see how to view the diagnosis list for a child.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Health** tab. The Current Health page displays.

3. Click the **Diagnosis** tab. The Diagnosis List page displays.

4. View the information displayed in the **Diagnosis List** table.

Tip: You can click the 🔍 icon in the **Detail** column to view detailed diagnosis information. The Add/Edit Diagnosis page displays when clicked.

Enter a Diagnosis

Use this exercise to enter information about a diagnosis for a child.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Health** tab. The Current Health page displays.

3. Click the **Diagnosis** tab. The Diagnosis List page displays.

4. Click **Add Diagnosis**. The Add/Edit Diagnosis page displays.

5. Perform an **ICD Code Search** by entering either an **ICD Code** or a **Description** and click **Search**.

6. In the **ICD Code List** table, click the **Select** radio button to indicate the appropriate ICD9 code for the diagnosis.

7. In **Start Date**, enter or select the starting date of the date range for which the diagnosis is effective. You can click the ✧ icon to select a date from a calendar.

📝**Note:** Entering or selecting an **End Date** and clicking **Save** will inactivate the diagnosis record. Once a diagnosis record has been inactivated, no changes can be made to the diagnosis record, and the diagnosis record cannot be reactivated.

8. Select the **Primary** check box to indicate that the diagnosis is the child's primary diagnosis as necessary.

📝**Note:** Only one diagnosis can be designated as the primary diagnosis for a child. The **Primary** check box must be cleared for any diagnosis marked as primary before another diagnosis can be designated as the primary diagnosis.

9. Click **Save**.

📝**Note:** Once a new diagnosis is saved, the **ICD9 Code** and diagnosis **Start Date** can no longer be changed. When a diagnosis record is saved after an **End Date** has been specified, the entire record can no longer be changed.

View a Child's Domain Assessments

Use this exercise to see how to view a child's domain assessments.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔎 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Domains** tab. The Domain Summary page displays.

3. Under **Search Filter**, select the type of **Domain** to display.

4. Select either the **Current** or **All** radio button to filter the list of results that display.

5. View the list of domain assessments that display in the **Domain** table.

> **Tip:** You can click the 🔍 icon in the **Detail** column to view detailed domain assessment information. The Domain Assessment Detail page displays when clicked. You can also click a link in the **Authorization** column to view detailed authorization information. The View Authorization Detail page displays when clicked.

Add a Domain Assessment

Use this exercise to add a new domain assessment.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Domains** tab. The Domain Summary page displays.

3. Click either the **Assessment with Authorization**, or the **Assessment without Authorization** button. The Domain Assessment Detail page displays.

4. In **Domain Name**, enter the name of the domain.

5. In **Date Collected**, enter or select the date on which the domain information was collected, or enter the evaluation/assessment date.

6. In **Clinician Name**, enter the name of the clinician who performed the evaluation in 65 characters or less.

7. In **Method**, select the method by which evaluation was performed.

> ✎**Note: Child's Age at Assessment** displays the child's age in months at the time of the evaluation based on the child's date of birth and the date on which the assessment was given. This information is read-only and cannot be changed.

8. In **Data Available?**, select the **Yes** or **No** radio button to indicate whether data was available at the time of the evaluation.

9. In **Additional Information is Needed?**, select one of the following radio buttons to indicate whether additional information was necessary at the time of the evaluation:

   • Select the **For Eligibility** radio button to indicate that additional information is needed for eligibility.

   • Select the **For IFSP** radio button to indicate that additional information is needed for the IFSP.

   • Select the **No** radio button to indicate that additional information was not necessary.

10. In **Reviewed?**, select the **Yes** or **No** radio button to indicate whether assessment data was reviewed at the time of the evaluation.

11. In **Results**, enter any specific results regarding the child's level of performance in 250 characters or less.

12. In **Concerns**, select the **Yes** or **No** radio button to indicate whether concerns exist at the time of the evaluation.

13. In **Reason for Concern**, enter an explanation of the concerns that exist in 250 characters or less. This is required information whenever the **Yes** radio button is selected in **Concerns**.

> ✏**Note: Eval/Assess Authorization #** displays the current authorization number if the **Assessment with Authorization** button was selected in step 3 of this exercise. If the **Assessment without Assessment** button was selected in step 3, the **Eval/Assess Authorization #** is blank. This information is read-only and cannot be changed.
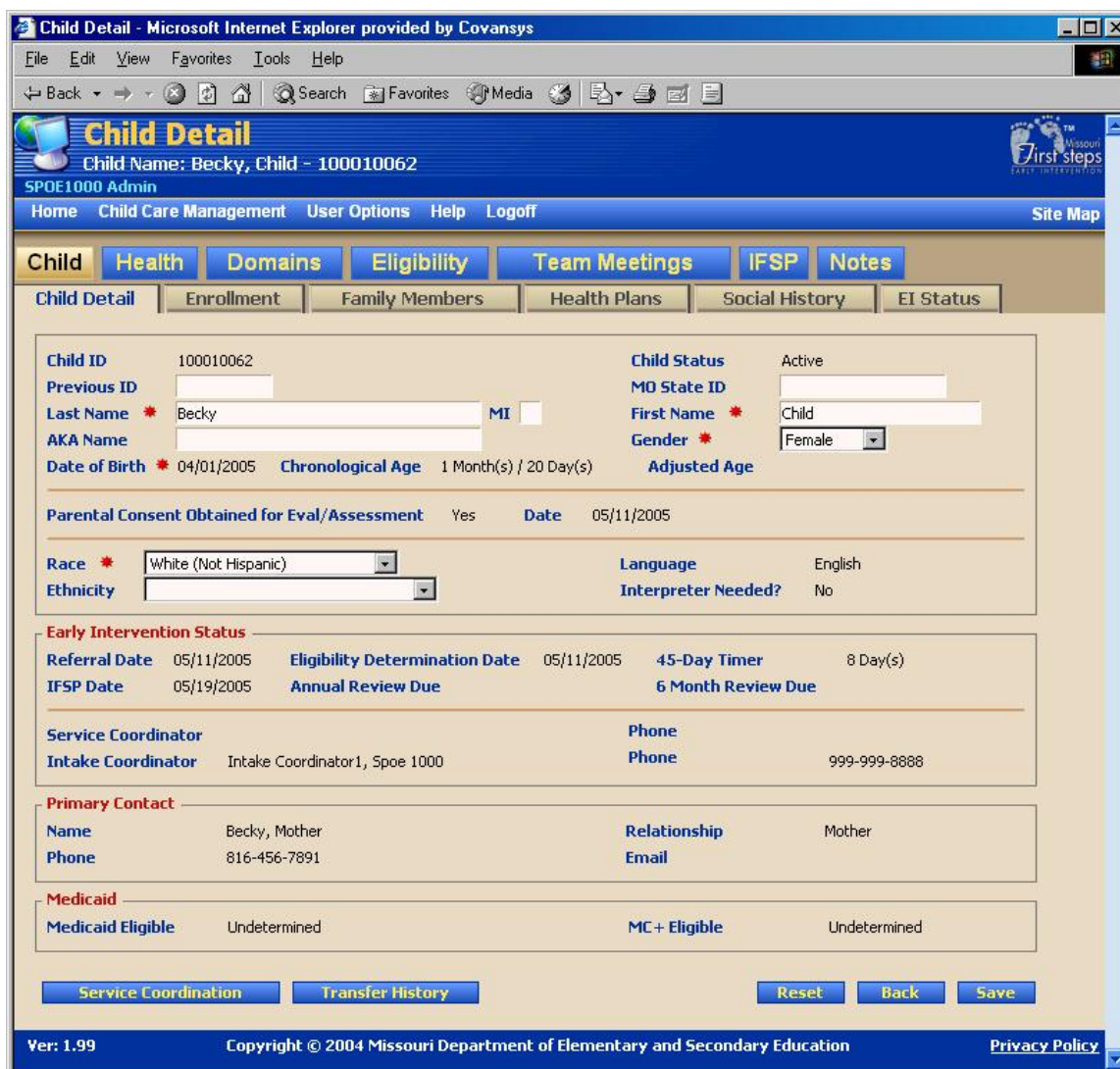
14. Select the **Assessment Completed** check box to indicate that the assessment was completed at the time of the evaluation.

15. Click **Save**.

View a Domain Summary Report

Use this exercise to see how to view a domain summary report.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Domains** tab. The Domain Summary page displays.

3. Click **Domain Summary Report** to view the domain summary report in a printer-friendly format.

IFSPDomainSummary - Microsoft Internet Explorer provided by Covansys			

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Child Name	Becky, Child	Child ID	100010062
	Domain Summary Report		
Domain Name	Physical		
Domain Summary			
Clinician Name		Date Collected	05/10/2005
Method	Eval/Assessment	**Child's Age at Assessment**	1 Month(s)
Additional Information is needed?	For IFSP		
Results	ldjflskdjf		
Concerns	Yes	Eval/Assess Authorization #	
Reason for Concern	lkjdflskjf		
Skill Type	Feeding Skills		

Select	Acquired Skills
Yes	Formula/Breast fed only

Is this an area of concern?	Yes
Comments	ldfjlskdjs
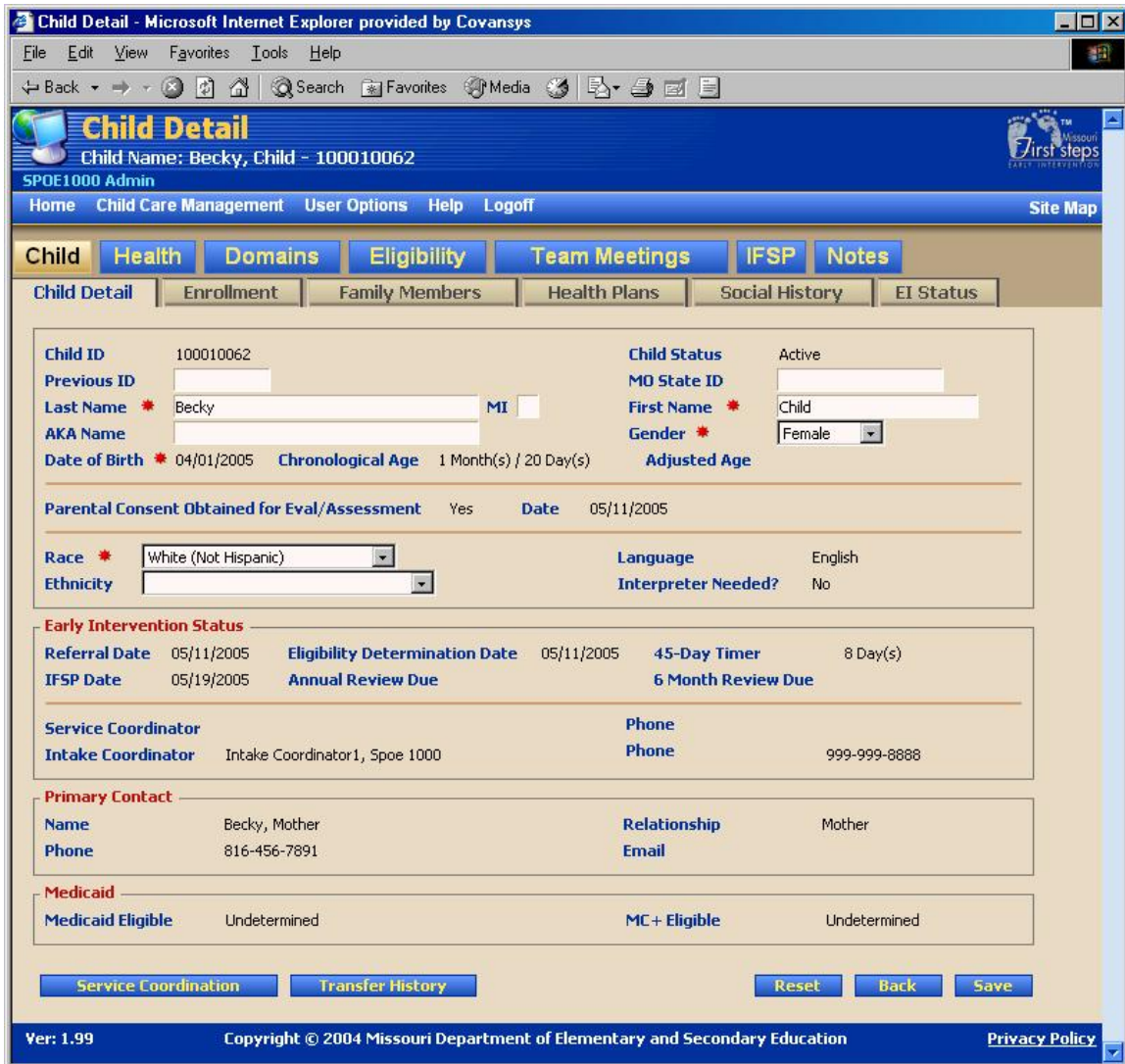
Child Name	Becky, Child	Child ID	100010062
	Domain Summary Report		
Domain Name	Vision		
Domain Summary			
Clinician Name	Optometrist, Provider	Date Collected	05/12/2005
Method	Eval/Assessment	**Child's Age at Assessment**	1 Month(s)
Additional Information is needed?	For Eligibility		
Results	ldk;lsdfk;dlsf		
Concerns	No	Eval/Assess Authorization #	A100010062-1
Reason for Concern			

View a Child's Developmental History

Use this exercise to see how to view a list of a child's developmental milestones.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Domains** tab. The Domain Summary page displays.

3. Click the **Development** tab. The [Developmental History](#) page displays.

4. View the list of developmental milestones in the **Developmental Milestones** table.

Tip: You can click the 🔍 icon in the **Detail** column to view detailed developmental milestone information. The Developmental Milestones page displays when clicked.

Enter a Developmental Milestone

Use this exercise to see how to enter developmental milestones for a child.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Domains** tab. The Domain Summary page displays.

3. Click the **Development** tab. The Developmental History page displays.

4. Click **Add Developmental Milestone**. The Developmental Milestones page displays.

5. Select a **Skill Type**. The **Skills List** table will refresh to display skills of the selected type.

6. Select a check box in the **Select** column of the **Skills List** table to indicate that a specific skill has been acquired by the child. More than one skill can be selected. If the child has acquired none of the skills listed, you can skip this step.

7. Select the **Yes** or **No** radio button in **Is this an Area of Concern?** to indicate that certain concerns surround the selected skill(s).

8. In **Comment**, enter any comments about the selected skill(s) in 250 characters or less.

9. Click **Save**.

Eligibility Information

Enter Eligibility Determination for an Eligible Child

Use this exercise to enter eligibility determination information for an eligible child.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔎 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Eligibility** tab. The Eligibility Determination page displays.

3. Enter or select the **Eligibility Determination Date**. You can click the icon to select a date from a calendar. The date specified must be in MM/DD/CCYY format. The date specified must be greater than the referral date for the enrollment period. The date specified cannot be greater than the initial/Interim IFSP Team Meeting date. If this field is left blank when the eligibility edits run and if the eligibility passes successfully, today's date is automatically entered and saved. Once the eligibility edits run, the **Eligibility Determination Date** cannot be changed.

> **Tip: Enrollment Period** displays the dates for the enrollment period currently being viewed. The enrollment period starts from the referral date to the date the child's enrollment record is ended. If you are viewing the current enrollment period, the **To** date is blank. This information is read-only and cannot be changed.

4. Select the **Child Is Eligible** radio button to indicate that the child is eligible to participate in the program. If selected, an ICD9 Code is required before the eligibility can be processed and saved. If selected, at least one of the four eligibility reasons must exist with active dates. If the reason selected has additional check boxes below it, a minimum of one for each must be selected. Once a child is determined eligible, the child cannot be changed back to ineligible after the edits program runs.

5. Add eligibility reasons as necessary until all relevant eligibility reasons have been added. For more information on the process of adding eligibility reasons, see Add an Eligibility Reason.

Note: If necessary, click an icon displayed in the **Detail** column of the **Eligibility Reason(s)** table to view or update a specific eligibility reason.

Note: If necessary, click a link in the **Delete** column of the **Eligibility Reason(s)** table to delete a specific eligibility reason.

6. Select a radio button in the **Primary** column of the **Eligibility Reason(s)** table to specify a specific reason as the primary reason for eligibility. Only one reason may be marked as the primary eligibility reason. One primary eligibility reason is required to successfully pass the eligibility edits. If a primary eligibility reason is ended, a new primary eligibility reason must be identified to successfully pass the eligibility edits (only the Case Administrator may make these changes).

7. Select a **Primary Program Eligibility Diagnosis** from the **Diagnosis List** using the link. This is required in order to pass eligibility edits. The diagnosis must exist on the child's diagnosis page to be selected as the Primary Program Eligibility. Once selected, the ICD9 code and description are displayed as read-only information.

8. Once all of the eligibility determination information is correct, click **Save**.. When **Save** is clicked, a message asking you to confirm that you want to run the eligibility edits. Click **Yes** or **No** to continue. If **Yes** is clicked, eligibility edits are processed. If errors are found during this process, the **Data Edit Errors** page displays. If no errors are found during this process, a message displays indicating that the eligibility edits were successful. After edits have been run for eligibility, the save button is unavailable for the remainder of the enrollment period. If **No** is selected, the information entered is saved, but no eligibility edits are processed.

Note: After the eligibility determination information has been saved, it can only be updated by a Case Administrator and only if the child's enrollment is current and active.

Enter Eligibility Determination for an Ineligible Child

Use this exercise to enter eligibility determination information for an ineligible child.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Eligibility** tab. The Eligibility Determination page displays.

3. Enter or select the **Eligibility Determination Date**. The date specified must be in MM/DD/CCYY format. You can click the 🌐 icon to select a date from a calendar. The date specified must be greater than the referral date for the enrollment period. The date specified cannot be greater than the initial/Interim IFSP Team Meeting date. If this field is left blank when the eligibility edits run and if the eligibility passes successfully, today's date is automatically entered and saved. Once the eligibility edits run, the **Eligibility Determination Date** cannot be changed.

> 🌐**Tip: Enrollment Period** displays the dates for the enrollment period currently being viewed. The enrollment period starts from the referral date to the date the child's enrollment record is ended. If you are viewing the current enrollment period, the **To** date is blank. This information is read-only and cannot be changed.

4. Select the **Child Is Not Eligible** radio button to indicate that the child is ineligible to participate in the program.

5. Under **Child Is Not Eligible**, enter the **Reason** that the child is not eligible to participate in the program.

> **Tip:** When a child is not eligible, the **End Enrollment** checkmark displays and indicates that you are ending the enrollment period for the child. **End Enrollment Reason** displays the default reason that the child is ineligible. This information is read-only and cannot be changed.

6. Once all of the eligibility determination information is correct, click **Save**. When **Save** is clicked, a message asking you to confirm that you want to run the eligibility edits. Click **Yes** or **No** to continue. If **Yes** is clicked, eligibility edits are processed. If errors are found during this process, the **Data Edit Errors** page displays. If no errors are found during this process, a message displays indicating that the eligibility edits were successful. After edits have been run for eligibility, the save button is unavailable for the remainder of the enrollment period. If **No** is selected, the information entered is saved, but no eligibility edits are processed.

> **Note:** After the eligibility determination information has been saved, the child's current enrollment is ended and the child's information can no longer be changed.

Add an Eligibility Reason

Use this exercise to add an eligibility reason.
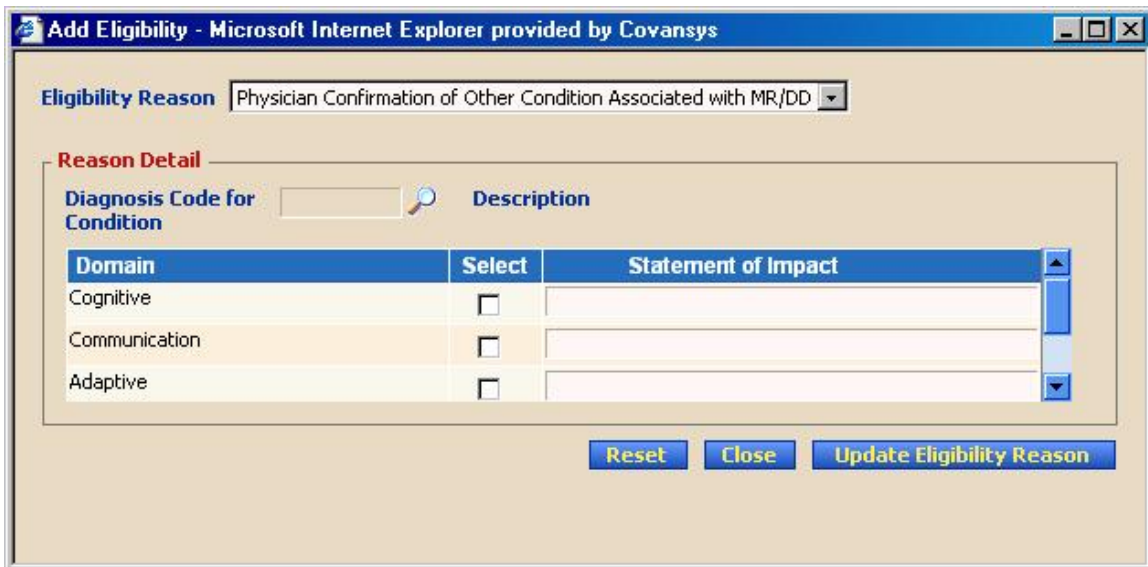
> ✎**Note:** This function is only available for current, active enrollment and only if the eligibility determination information has not been saved. Once the eligibility determination information for the current, active enrollment is saved, it can only be changed by a Case Administrator.
>
> This function is a part of the processes of entering and updating eligibility determination information and therefore begins on the Eligibility Determination page. For more information about the processes on which this function depends, and the steps necessary to display the Eligibility Determination page for a child, see the following exercises:
>
> - Enter Eligibility Determination for an Eligible Child
> - Update Eligibility Determination Information

Complete the following steps to finish this exercise:

1. On the Eligibility Determination page, click **Add Eligibility Reason**. The Add Eligibility Reason page displays.

2. Select a primary **Eligibility Reason** from the drop-down list. Fields specific to the eligibility reason selected display under **Reason Detail**.

> ✎**Note:** A reason may be added one at a time to the **Eligibility Reason(s)** table on the Eligibility Determination page. After an item is added to the table on the Eligibility Determination page, that item is no longer available as an option in the **Eligibility Reason** drop down list on this page.

3. Under **Reason Detail**, complete the information required for the eligibility reason selected. A different detail for each eligibility reason is required to save the eligibility reason to the child's record.

4. Once all of the information is correct, click **Update Eligibility Reason**.

> **Note:** Clicking **Update Eligibility Reason** adds the eligibility reason to the **Eligibility Reason(s)** table on the Eligibility Determination page, but the eligibility reason is not actually saved to the list until the eligibility reason validation edits are passed.

Update an Eligibility Reason
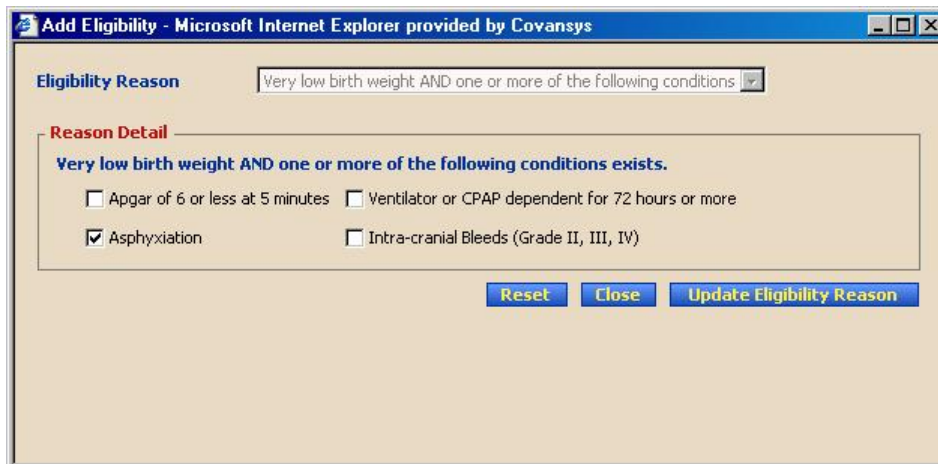
Use this exercise to update an eligibility reason.

Note: This function is a Case Administrator option only, and only available for users with Case Administration rights. Case Administrators can perform this function after eligibility has already been determined. This function is only available for current, active enrollment and only if the eligibility determination information has been saved but the eligibility edits have not been completed. Once the eligibility determination information for the current, active enrollment is saved, it can only be changed by a Case Administrator.

This function is a part of the processes of entering eligibility determination information and therefore begins on the Eligibility Determination page. For more information about the processes on which this function depends, and the steps necessary to display the Eligibility Determination page for a child, see Enter Eligibility Determination for an Eligible Child.

Complete the following steps to finish this exercise:

1. On the Eligibility Determination page, click the 🔍 icon in the **Detail** column for a specific eligibility reason. The Add Eligibility Reason page displays.

Tip: The **Eligibility Reason** cannot be changed when updating an eligibility reason.

2. Update the **Reason Detail** as necessary.

3. Once all of the information is correct, click **Update Eligibility Reason**.
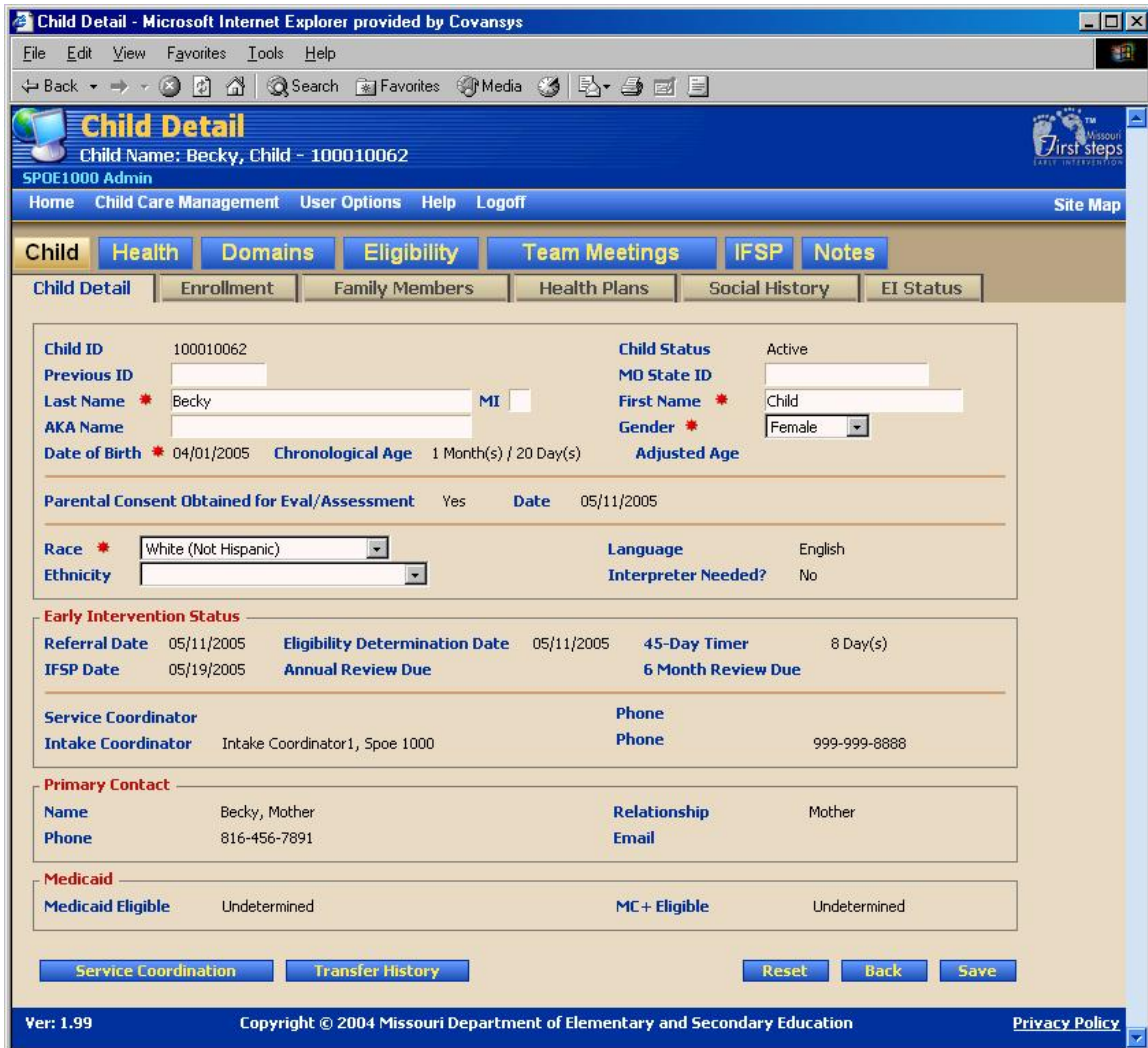
Note: When the eligibility reason is updated and the admin user selects the save button, the eligibility edits run automatically and must be passed before the updated reason is actually saved to the list.

View a List of Eligibility Sources

Use this exercise to display a list of eligibility sources.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Eligibility** tab. The Eligibility Determination page displays.

3. Click the **Eligibility Source** tab. The Eligibility Source List page displays.

4. View the list of eligibility sources in the table.

Enter an Eligibility Source

Use this exercise to enter an eligibility source.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Eligibility** tab. The Eligibility Determination page displays.

3. Click the **Eligibility Source** tab. The Eligibility Source List page displays.

4. Click **Add Eligibility Source**. The Add Eligibility Source page displays.

5. In **Source Name**, enter the first name and the last name of the individual who provided input in the child's eligibility determination process in 65 characters or less.

6. Select a description of the role that the individual plays in the child's life from **Eligibility Source Role**.

7. If **Other** is selected from **Eligibility Source Role**, enter a description of the role that the individual plays in the child's life in **Specify if Other Role Selected**.

8. Select the method by which the individual provided input in the child's eligibility determination process from **Method of Input**.

9. If **Other** is selected from **Method of Input**, enter a description of the method by which the individual provided input in the child's eligibility determination process in **Specify if Other Method Selected**.

10. Click **Save**.

View a List of Eligibility Authorizations

Use this exercise to display a list of eligibility authorizations.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Eligibility** tab. The Eligibility Determination page displays.

3. Click the **Eligibility Authorizations** tab. The Eligibility Authorizations page displays.

Tip: Under **Search Filter**, you can select the **Show Current Enrollment Authorizations Only** check box to display only currently enrollment authorizations in the **Authorization List** table. When the check box is selected or cleared, the information displayed in the **Authorization List** table is refreshed.

4. View the list of eligibility authorizations in the table.

Tip: You can click the icon in the **Auth** column to view detailed authorization information. The View Authorization Detail page displays when clicked.

View a List of Eligibility Notes

Use this exercise to display a list of eligibility notes from the Eligibility Determination page.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Eligibility** tab. The Eligibility Determination page displays.

3. Click **Eligibility Notes**. The Eligibility Notes List page displays.

4. View the list of eligibility notes in the table.

Tip: You can click the 🔍 icon in the **Detail** column to view detailed eligibility note information. The Add Eligibility Notes page displays when clicked.

Enter an Eligibility Note

Use this exercise to enter an eligibility note from the Eligibility Determination page.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Eligibility** tab. The Eligibility Determination page displays.

3. Click **Eligibility Notes**. The Eligibility Notes List page displays.

4. Click **Add Notes**. The Add Eligibility Notes page displays.

5. Enter or select the **Eligibility Note Day**. You can click the ♦ icon to select a date from a calendar. If the date is left blank, today's date is entered.

6. In **Eligibility Notes**, enter the text of the note in 250 characters or less.

7. Click **Save**.

Note: Once an eligibility note is saved, the note can no longer be updated or changed.

Team Meetings

The **Team Meetings** tab is not available until the child's record is in Eligibility status. This means the child has been determined eligible for E.I. services and has passed the program edits related to Eligibility.

Meeting Types

There are six different meeting types within the system and it is important to understand that the business rules for each meeting type are part of the Early Intervention program compliance edits and must be met to schedule and finalize each meeting type.

Interim

The *Interim* meeting type is designed only for those children who require immediate Early Intervention services prior to the *Initial* meeting. The *Interim* meeting can only be held one time and it must be the very first meeting on a child's enrollment period. The very first meeting that can be scheduled must be an *Interim* or *Initial* meeting.

Initial

The *Initial* meeting is required for each child in the program and is used to plan the IFSP for the child and family. The *Initial* meeting is a required meeting for each enrollment period. The very first meeting that can be scheduled must be an *Initial* or *Interim* meeting. An *Annual*, *Inter-periodic*, or *6-Month Review* meeting cannot be scheduled if the *Initial* meeting has not been finalized. IFSP specifications are established during the *Initial* meeting and determined by the IFSP type.

Annual

Every 365 days, the IFSP needs to be reviewed by adding an *Annual* meeting. *Annual* meetings can only be scheduled after the *Initial* and *6-Month Review* meetings have been finalized. The IFSP specifications for the next IFSP period are established during the *Annual* meeting and determined by the IFSP type.

Inter-periodic

A parent or other team member may call a team meeting at anytime. When this occurs, an *Inter-periodic* meeting needs to be created. *Inter-periodic* meetings are held at any time during an IFSP period. During the *Inter-periodic* meeting, the IFSP specifications for the current IFSP period cannot be changed, but IFSP data may be updated and service authorizations can be added.

6-Month Review

A *6-Month Review* of the IFSP is required six months after the *Initial* meeting as well as six months after each *Annual* meeting. The *6-Month Review* meeting must be scheduled and finalized before the next *Annual* meeting may be scheduled. The *6-Month Review* meeting must be held during a current IFSP period. During the *6-Month Review* meeting, the IFSP specifications for the current IFSP period cannot be changed, but IFSP data may be updated and service authorizations can be added.

Lapsed IFSP

If a meeting cannot be held due to scheduling requirements causing a gap in the services that can be delivered to a child; the Case Administrator may create a *Lapsed IFSP* to cover these services for a maximum of 45-days until the meeting can be held. A *Lapsed IFSP* does not require a meeting be scheduled; because the Case Administrator uses the **Location Administration** menu option on the **Child Care Management** menu to create a *Lapsed IFSP* automatically. New service authorizations may not be created for a *Lapsed IFSP*. Instead, only those authorizations that existed from the previous IFSP period may be "continued" for the duration of the *Lapsed IFSP* period. A *Lapsed IFSP* cannot be created if a current IFSP exists on the child's record. Two *Lapsed IFSP* meetings cannot be created back to back. A *Lapsed IFSP* cannot be the first meeting created on a child's record.

Meeting Statuses

There are five different meeting types within the system.

Tentative

Meeting status of *Tentative* is given to all meetings when first created and saved. To schedule a meeting, the meeting status must be *Tentative*. Only meetings with a status of *Tentative* may be deleted on the [Team Meeting Planner](#) page. *Tentative* meeting information can be updated at any time.

Scheduled

A meeting can be *Scheduled* if no other meeting has a status of *Scheduled* or *Ongoing* and the meeting date is within 30 days in the future of the current date. If the meeting date is more than 30 days in the future, the meeting status will remain at *Tentative*. A meeting date in the past may be scheduled if it does not exceed 60 days as of the current date and does not supercede any other business rules (like an *Annual* meeting being held prior to the *Initial* meeting). Once a meeting is *Scheduled*, it may not be deleted.

Canceled

The meeting status of *Canceled* is only used for those meetings that are not going to be held and have a current status of *Scheduled*.

Rescheduled

The *Reschedule* option is available if the meeting status is *Scheduled* and the meeting date or primary meeting type must be changed. If the primary meeting type or meeting date needs to be adjusted, the meeting can be *Rescheduled*. A *Rescheduled* meeting is saved as a new meeting with a status of *Tentative*. The originating meeting may not be updated once it has been *Rescheduled*.

Ongoing
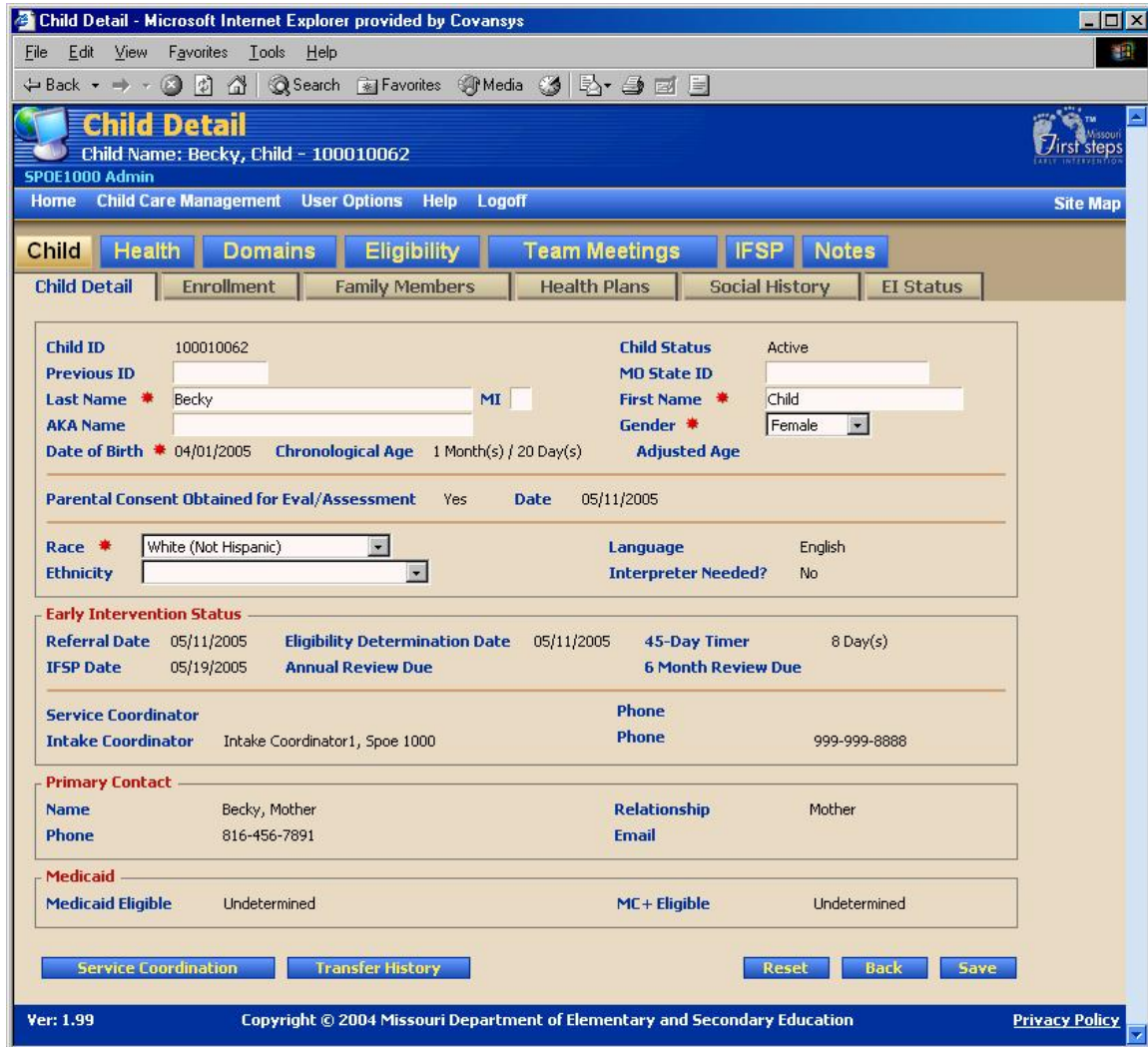
The meeting status is updated from *Scheduled* to *Ongoing* when the meeting date is the same as or prior to the current date. The status remains at *Scheduled* until the first meeting attendance record is updated and saved to the system. Once a meeting is *Ongoing* it cannot be *Canceled* or *Rescheduled*. A meeting will remain in *Ongoing* status until it is finalized.

View IFSP Team Meeting History

Use this exercise to view IFSP team meeting history.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Team Meetings** tab. The Meeting History page displays.

Note: If no team meetings currently exist for a child, the Team Meeting Planner page displays when the **Team Meetings** tab is clicked. The Meeting History page can only be displayed after the first team meeting is scheduled.

3. In the **Meeting List** table, click the radio button in the **Select** column to select the meeting to view.

Tip: When a scheduled meeting should occur, it is highlighted in the **Meeting List** table. Once a radio button is selected in the **Select** column, you must click the **Reset List** button to clear the selection and view the most current meeting's information on the pages within **Team Meetings**. Once a meeting is selected, the **IFSP Date** is displayed at the top right of the page.

4. Click the **Meeting Planner** tab. The Team Meeting Planner page displays.

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5. View the meeting planner information. Depending on the status of the meeting, some of this information may be updated and team members may be added or removed. You can click the 🔍 link in the **Detail** column to view detailed team member information.

> ✍ **Note:** If a meeting is finalized, the tabs within the **Team Meetings** and **IFSP** areas are displayed in red. Tabs with red asterisks indicate areas that are in view-only mode. Information on tabs with red asterisks is read-only and cannot be changed. This allows you to view the information that was added for a meeting that has been finalized.

> 🔑 **Tip:** To remove a team meeting member on this page, click the 🗑 icon in the **Remove** column of the **Team Meeting Member List** table. Members serving as the Service Coordinator or the Intake Coordinator cannot be removed.

6. Click the **Meeting Activities** tab. The IFSP Team Meeting Activities page displays.

7. View the meeting's activities. You can click on the links available on the page to view detailed information for each activity. Depending on the status of the meeting, some of the activities may be updated.

8. Click the **Team Members** tab. The IFSP Team Member List page displays.

9. View the current list of team members. You can click the 🔍 link in the **Detail** column to view or update detailed team member information, or click **Add Team Member** to add additional team members as necessary.

10. Click the **IFSP** tab. The IFSP Team Summary page displays.

11. View the team summary information. You can click the 🔍 link in the **Detail** column to view detailed team summary information. Depending on the status of the meeting, some of this information may be updated, or new team summaries may be added.

12. Click the **Family Assessment** tab. The Family Assessment page displays.

13. View the family assessment information. Depending on the status of the meeting, some of this information may be updated.

14. Click the **Outcomes** tab. The IFSP Outcomes page displays.

15. View information about the IFSP outcomes displayed. You can click the 🔍 link in the **Detail** column to view detailed outcome information. Depending on the status of the meeting, some of the detail information may be updated. You can click **Outcomes Reviewed for Meeting** to view the outcomes that have been reviewed as necessary.

16. Click the **Authorizations** tab. The IFSP Authorization List page displays.

17. View the authorization history for the meeting. You can click the link in the **Detail** column to view detailed authorization information. You can click **Add Authorization** to add a new authorization as necessary.

> **Note:** The only way to see all of the authorizations on a record is to have no selection made in the **Select** column of the **Meeting List** table on the Meeting History page. Otherwise, the authorizations displayed are specific to the meeting selected.

18. Click the **Other Services** tab. The IFSP Other Services page displays.
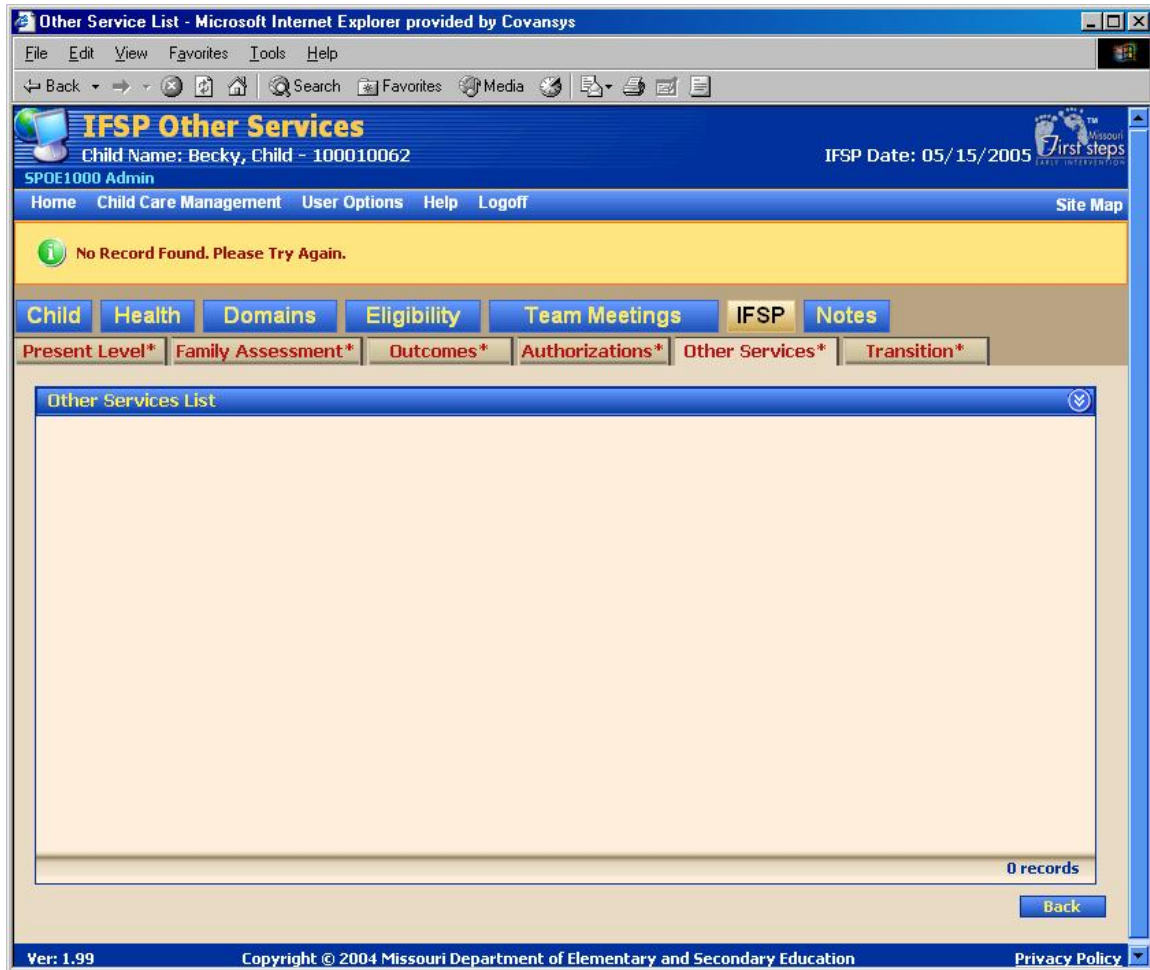
19. View the list of other services. You can click the 🔍 link in the **Detail** column to view detailed information about an other service. Depending on the status of the meeting, some of the detail information may be updated, or new services may be added.

20. Click the **Transition** tab. The IFSP Transition page displays.

Team Meetings
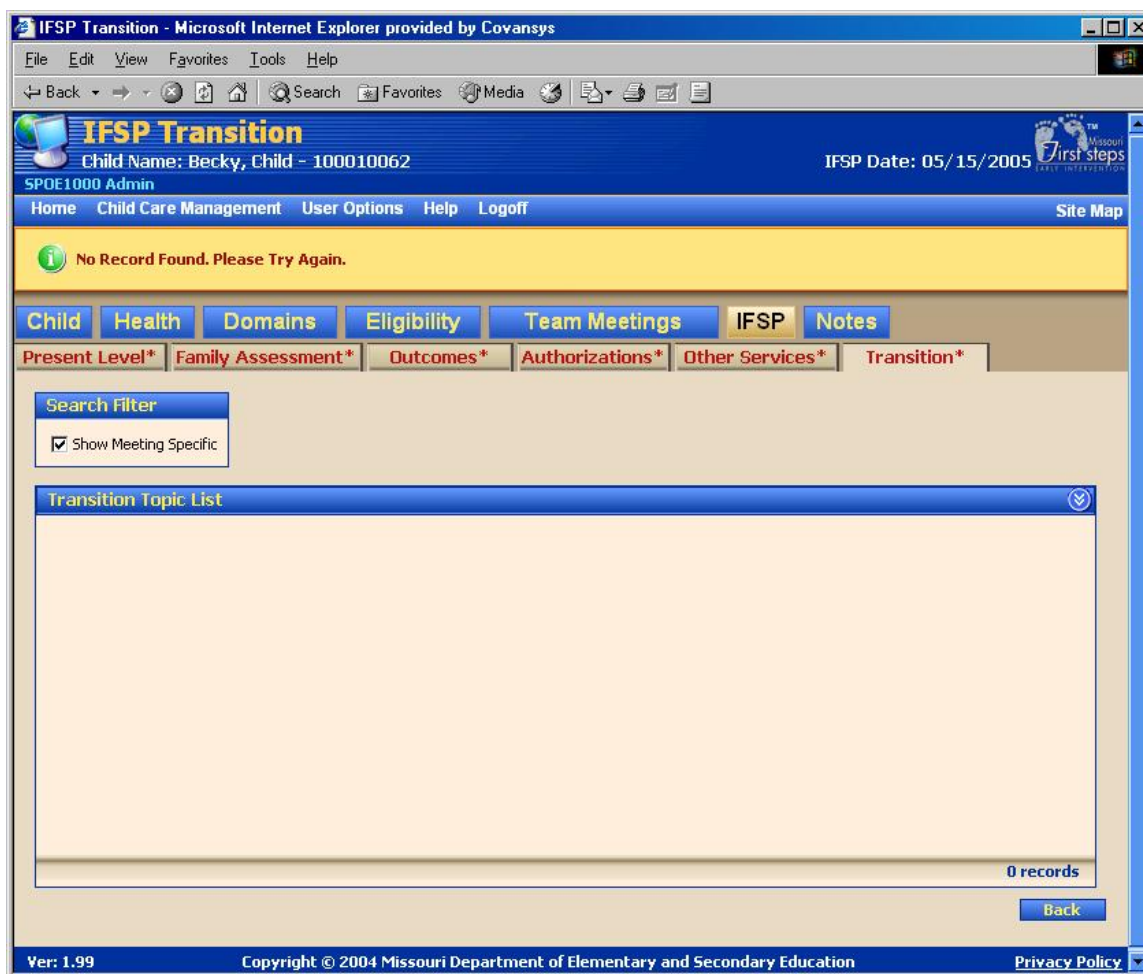
21. View the list of other services. You can click the 🔍 link in the **Detail** column to view detailed transition information. Depending on the status of the meeting, some of the detail information may be updated, or new transitions may be added.
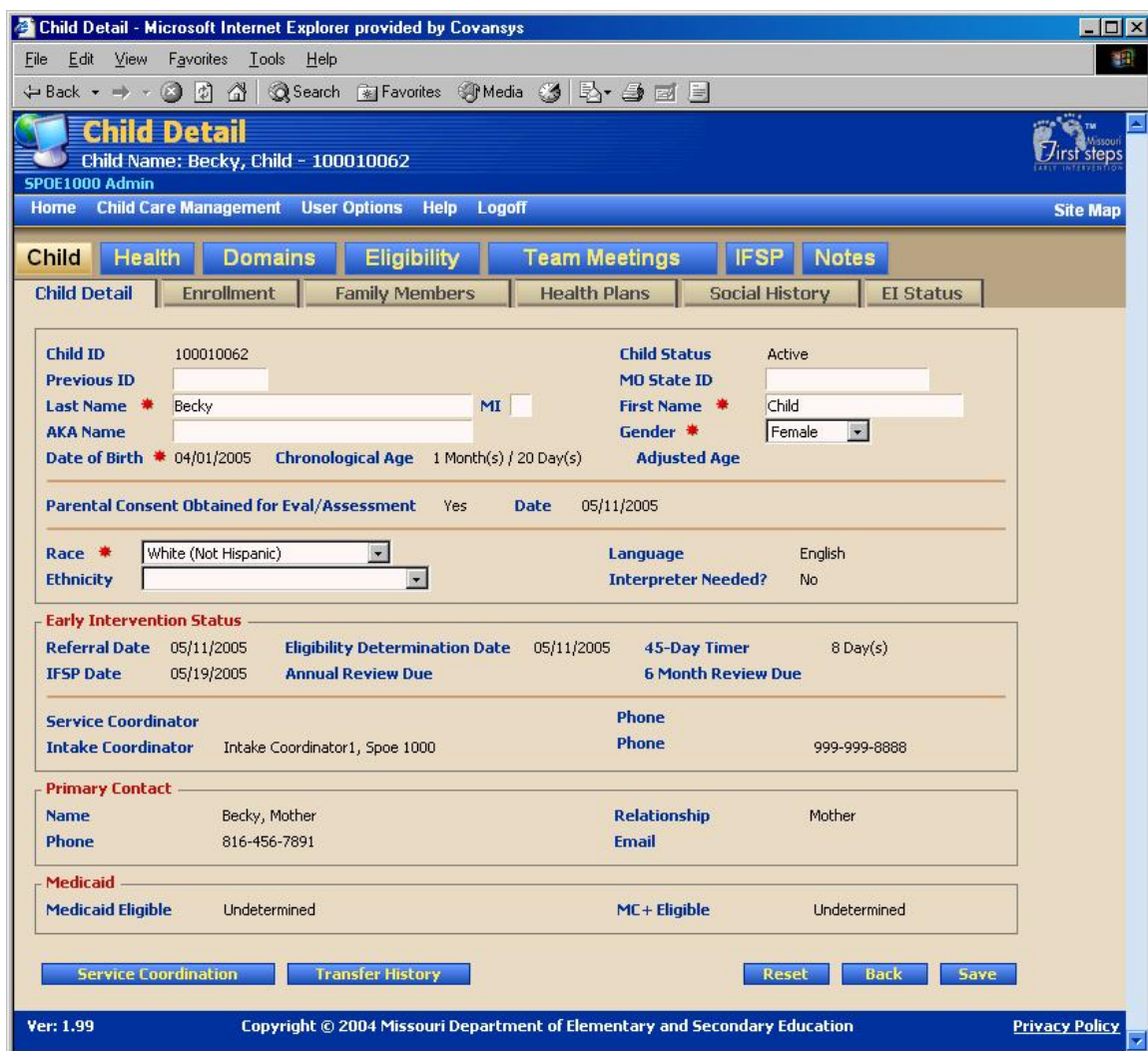
Define an Enrolled E.I. Provider as an IFSP Team Member

Use this exercise to define an E.I. provider who has enrolled with the Central Office as an IFSP team member.

> ✎**Note:** To add a team meeting member, the member must first be assigned as an active IFSP team member on a child's record before the member can be added to the **Team Meeting Member List** table on the Team Meeting Planner page.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Team Meetings** tab. The Meeting History page displays.

3. In the **Meeting List** table, click the radio button in the **Select** column to select the meeting to update.

> **Note:** If no team meetings currently exist for a child, the Team Meeting Planner page displays when the **Team Meetings** tab is clicked. The Meeting History page can only be displayed after the first team meeting is scheduled.

4. Click the **Team Members** tab. The IFSP Team Member List page displays.

5. Click **Add Team Member**. The IFSP Team Member page displays.

6. Select the **Enrolled E.I. Provider** radio button to define an enrolled E.I. provider as an IFSP team member. The page refreshes to display additional information based on your selection.

7. Complete the following information under **Search Filter** to filter the list of enrolled **E.I.** providers and to perform a search:

- In **Specialty**, select the specialty on which to search.

- In **Last Name,** enter the full or partial last name on which to search. A minimum of 2 characters must be entered to search for a last name.

- In **First Name**, enter the full or partial first name on which to search. This field can be left blank.

8. Click **Search** to filter the list of enrolled E.I. providers displayed in the **E.I. Provider List** table based on the search criteria specified.

9. Click the link in the **Select** column to define one or more enrolled E.I. providers as IFSP team members. The selected provider's information is displayed in the fields under **Member Detail**.

10. In **IFSP Team Primary Role**, select the new team member's primary role on the IFSP team.

11. If **Other** is selected in the **IFSP Team Primary Role** drop-down list, enter an **Other Role Description** as necessary.

12. In **Start Date**, enter the date on which the new team member's participation begins on the IFSP team. The date entered must be greater than or equal to the parental consent date.

13. In **End Date**, enter the date on which the new team member's participation ends on the IFSP team. The date entered must be greater than the **Start Date** and less than today's date.

14. Click **Add Team Member** to save the new team member. When clicked, the **Team Members Detail** page is refreshed and cleared to allow the quick entry of another team member.

15. Once all of the team members have been added, click **Close**.
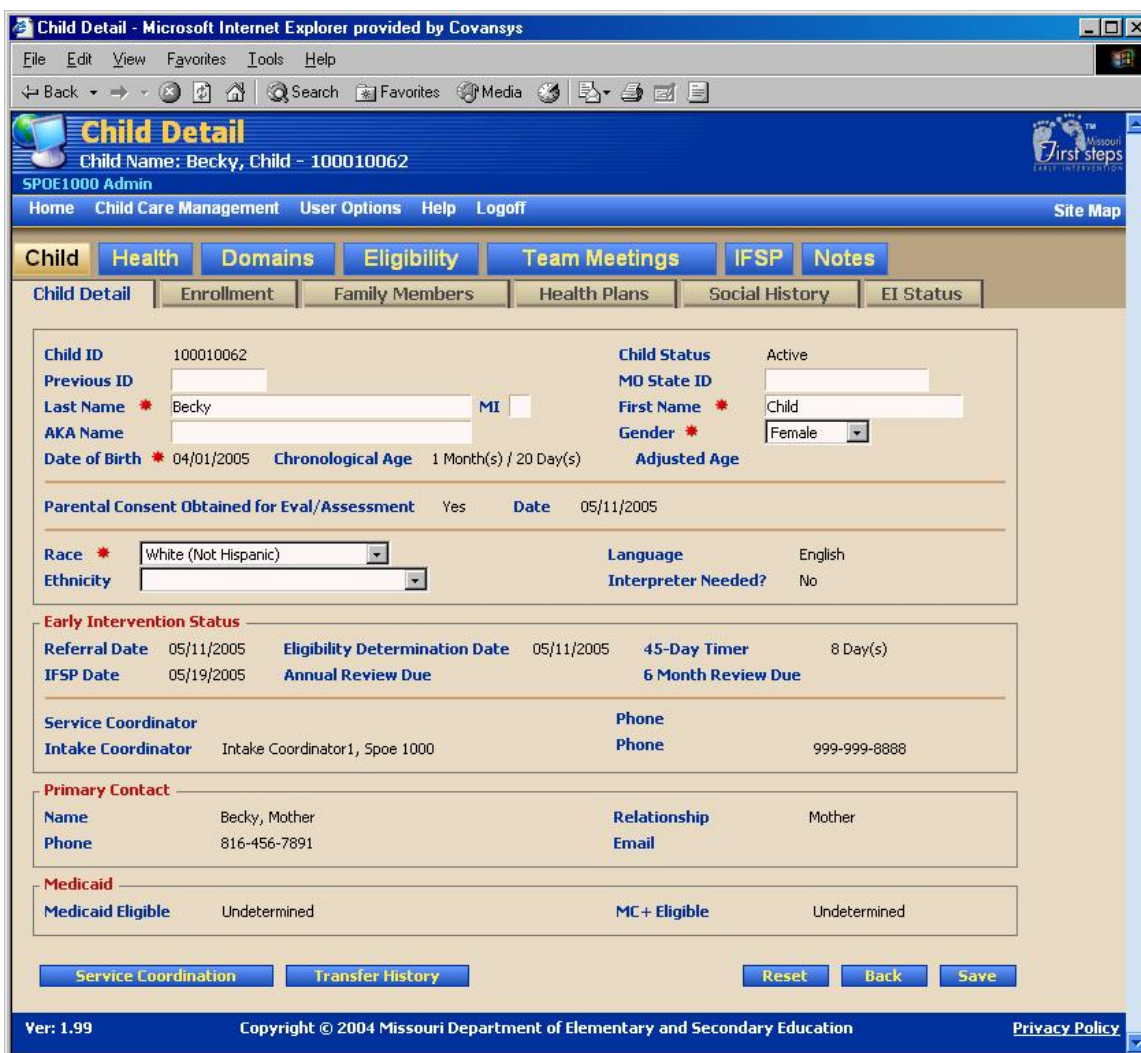
Define an Other IFSP Team Member

Use this exercise to define any other team member, including a parent, guardian, etc., as an IFSP team member.

> **Note:** To add a team meeting member, the member mist first be assigned as an active IFSP team member on a child's record before the member can be added to the **Team Meeting Member List** table on the Team Meeting Planner page.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Team Meetings** tab. The Meeting History page displays.

> **Note:** If no team meetings currently exist for a child, the Team Meeting Planner page displays when the **Team Meetings** tab is clicked. The Meeting History page can only be displayed after the first team meeting is scheduled.

3. In the **Meeting List** table, click the radio button in the **Select** column to select the meeting to update.

4. Click the **Team Members** tab. The IFSP Team Member List page displays.

5. Click **Add Team Member**. The IFSP Team Member page displays.

6. Select the **Other** radio button to define an "other" IFSP team member.

7. In **Last Name**, enter the new team member's last name. You can enter up to 40 characters in this text box.

8. In **First Name**, enter the new team member's first name. You can enter up to 25 characters in this text box.

9. In **Agency**, enter the name of the payee on the provider's account.

10. In **Address**, enter the new team member's street address information in 50 characters or less.

11. In **ZIP**, enter the zip code in which the new team member is located.

> **Tip:** Once a **ZIP** code is entered, the **City** and **State** are automatically displayed as read-only information.

12. In **Specialty**, enter the new team member's specialty.

13. In **IFSP Team Primary Role**, select the new team member's primary role on the IFSP team.

14. If **Other** is selected in the **IFSP Team Primary Role** drop-down list, enter an **Other Role Description** as necessary.

15. In **Phone**, enter the new team member's telephone number in 25 characters or less. You can enter an extension after the phone number as necessary.

16. In **Start Date**, enter the date on which the new team member's participation begins on the IFSP team. The date entered must be greater than or equal to the parental consent date.

17. In **End Date**, enter the date on which the new team member's participation ends on the IFSP team. The date entered must be greater than the **Start Date** and less than today's date.

18. Click **Add Team Member** to save the new team member. When clicked, the **Team Members Detail** page is refreshed and cleared to allow the quick entry of another team member.

19. Once all of the team members have been added, click **Close**.

Schedule an IFSP Team Meeting

Use this exercise to schedule an IFSP team meeting.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Team Meetings** tab. The Meeting History page displays.

> **Note:** If no team meetings currently exist for a child, the Team Meeting Planner page displays when the **Team Meetings** tab is clicked. The Meeting History page can only be displayed after the first team meeting is scheduled.

3. In the **Meeting List** table, click the radio button in the **Select** column to select the meeting to schedule.

4. Click the **Meeting Planner** tab. The Team Meeting Planner page displays.

5. In **Primary Meeting Type**, select a type for the IFSP team meeting. If this meeting has already been scheduled, this information is read-only and cannot be changed.

6. **Meeting Status** displays the current status of the IFSP team meeting. This information is read-only and cannot be changed.

7. Click the **Transition** check box to indicate that the IFSP team meeting is a transition meeting as necessary.

8. Click the **Part B** check box to indicate that the IFSP team meeting is a Part B meeting as necessary.

9. Click the **Compensatory** check box to indicate that the IFSP team meeting is a compensatory meeting as necessary.

10. In **Meeting Date**, enter or select the date on which the IFSP team meeting will occur. You can click the 💠 icon to select a date from a calendar.

11. In **Time**, enter the time at which the IFSP team meeting will occur in HH:MM AM/PM format.

12. In **Meeting Duration**, enter the duration of the IFSP team meeting in minutes.

13. In **Location Address**, enter the address information for the location at which the IFSP team meeting will occur in 250 characters or less.

14. In **Location Description**, enter a brief description of the location at which the IFSP team meeting will occur in 250 characters or less.

15. In **Meeting Agenda**, enter a brief agenda for the IFSP team meeting in 500 characters or less.

16. In the **Team Meeting Member List**, a list of members from a previously finalized team meeting are displayed. You can remove a member by clicking the link in the **Remove** column, or you can add a new team member to the table by clicking **Add Team Meeting Member**.

17. If **Add Team Meeting Member** is clicked, the Add Team Meeting Member page displays. Complete the following to add a new team member to the **Team Meeting Member List** table:

   - Click the check box in the **Select** column to add one or more team members to the IFSP team meeting.

   - Click **Save** to add the selected team member(s) and return to the Team Meeting Planner page.

18. Click the check box in the **Notified** column to indicate that an invitation has already been sent to the team member for the IFSP team meeting as necessary.

19. Click **Save** to save the meeting information and place the meeting in tentative status.

20. Click **Schedule Meeting** to schedule the meeting.

> **Tip:** Once a meeting is scheduled, you can click **Reschedule Meeting** to reschedule the meeting. When **Reschedule Meeting** is clicked, the meeting information can be updated on the Team Meeting Planner. You can also click **Cancel Meeting** to cancel the meeting as necessary. When **Cancel Meeting** is clicked, the IFSP Cancel Meeting page is displayed.

Team Meeting Activities

View Team Meeting Activities

Use this exercise to view team meeting activities for an IFSP team meeting.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Team Meetings** tab. The Meeting History page displays.

Note: If no team meetings currently exist for a child, the Team Meeting Planner page displays when the **Team Meetings** tab is clicked. The Meeting History page can only be displayed after the first team meeting is scheduled.

3. In the **Meeting List** table, click the radio button in the **Select** column to select the meeting to update.

4. Click the **Meeting Activities** tab. The IFSP Team Meeting Activities page displays.

5. Click on the available links to view team meeting activity information.

✎**Note:** In the image above, all of the links are not available because the meeting is currently in Scheduled status. If the meeting status is Ongoing or Finalized, all links on this page are enabled. If the meeting status is Rescheduled, Canceled or Tentative (or a meeting was not selected) then this page is not accessible and an error message is displayed on the Meeting History page.

Clicking a link on this page displays a new activity page in a window. When an activity is completed, the window is closed and you are returned to this page. Each completed activity on this page is indicated with a check mark.

For a lapsed IFSP, only the following links are available on this page:

- IFSP Authorizations
- Meeting Notes
- Next Meeting
- Delivered Service(s) (Optional)
- Finalize Meeting

Add a Meeting Attendance Activity

Use this exercise to add an Attendance meeting activity for an IFSP team meeting.

Complete the following steps to finish this exercise:

1. On the IFSP Team Meeting Activities page, click the **Attendance** link. The IFSP Meeting Attendance page displays.

2. Click the 🔍 icon in the **Detail** column for a specific team member. The Meeting Attendance Detail page displays.

3. Select the member's **Team Meeting Role**.

4. Select the member's **Method of Participation**.

5. Enter the member's **Length of Participation in Meeting** in minutes. The number of minutes entered must be in 15-minute increments.

6. Enter the **Other Role Description**. This is required information when **Other** is selected in the **Team Meeting Role** drop-down list.

7. Enter the **Substitute's Name**. This is required information when **By Substitute** is selected in **Method of Participation** drop-down list.

8. Click **Save**.

9. Repeat steps 2-8 of this exercise for each additional team member listed in the **Meeting Attendance List** table.

Note: Recording of attendance for the first team meeting member updates the meeting status from Scheduled to Ongoing if the date of the meeting is today or a day in the past.

10. Once all of the team members listed have been updated, click **Activities** to return to the IFSP Team Meeting Activities page.

Tip: Once you return to the IFSP Team Meeting Activities page, a check mark is displayed next to the **Attendance** link to indicate that this activity has been completed. The other activity links on the page become available once the **Attendance** activity has been completed.

Add an IFSP Specifications Activity

Use this exercise to add an IFSP Specifications meeting activity for an IFSP team meeting.

Complete the following steps to finish this exercise:

1. On the IFSP Team Meeting Activities page, click the **IFSP Specifications** link. The IFSP Specifications page displays.

2. Select the **IFSP Type**.

> **Tip:** The **IFSP Type** selected changes the behavior of this page. When **Compensatory**, **Interim**, or **Lapsed IFSP** is selected, the **To** date becomes enabled and required. When **Part B** is selected, the **Part B Eligibility is Confirmed** check box becomes displayed and enabled.

3. Enter the **To** date for the IFSP. This field is only enabled when **Compensatory**, **Interim**, or **Lapsed IFSP** is selected in the **IFSP Type** drop-down list. When displayed, the date is required. You can click the 🖉 icon to select a date from a calendar.

4. Select the **Primary Setting for IFSP**.

5. Enter the **Other Setting Description**. This is required information when **Other** is selected in the **Primary Setting for IFSP** drop-down list.

6. Click **Save** to return to the IFSP Team Meeting Activities page

Tip: Once you return to the <u>IFSP Team Meeting Activities</u> page, a check mark is displayed next to the **IFSP Specification** link to indicate that this activity has been completed.

Add a Review Family Assessment Activity

Use this exercise to add a Review Family Assessment meeting activity for an IFSP team meeting.

Complete the following steps to finish this exercise:

1. On the IFSP Team Meeting Activities page, click the **Review Family Assessment** link. The Family Assessment page displays.

2. Click the **Yes** or **No** radio button in **Family Consented to Assessment**.

> **Note:** If the **No** radio button is selected, only the **Consent Date** can be entered. All other information on the page becomes read-only and cannot be changed until the **Yes** radio button is selected. Before the meeting finalized, **No** can be changed to **Yes**. However, **Yes** can be withdrawn before the meeting is finalized, but not be changed to **No**. If the **No** radio button is selected, enter or select the **Consent Date** and click **Save** to complete this activity.

3. Enter or select the **Consent Date**. You can click the � icon to select a date from a calendar. This is required information if the **Yes** radio button is selected in **Family Consented to Assessment**. A new date is not required for future IFSP meetings after the Initial IFSP meeting is finalized.

4. In **IFSP Family Assessment/Concerns**, enter any concerns expressed by the family during the assessment.

5. In **Family's Priorities**, enter the priorities outlined for the family during the assessment.

6. In **Strengths and Resources**, enter any strengths and resources outlined during the assessment.

7. Under **I would like to share the following concerns for myself, other family members or my child**, select one or more of the available check boxes as necessary.

8. Under **I have questions about or want help for my child in the following areas**, select one or more of the available check boxes as necessary.

9. Click **Save**.

> 📝**Note:** When the **Yes** radio button is selected and the record is saved, the **Consent Withdrawn Date** field is displayed. This field allows you to enter or select the date on which the family withdrew the approval for assessment. You can click the � icon to select a date from a calendar. When the **Consent Withdrawn Date** is entered, family assessment/routines pages are displayed in read-only mode. The date entered must be equal to or greater than the **Consent Date**.

10. Click **Activities** to return to the IFSP Team Meeting Activities page.

> 💬**Tip:** Once you return to the IFSP Team Meeting Activities page, a check mark is displayed next to the **Review Family Assessment** link to indicate that this activity has been completed.
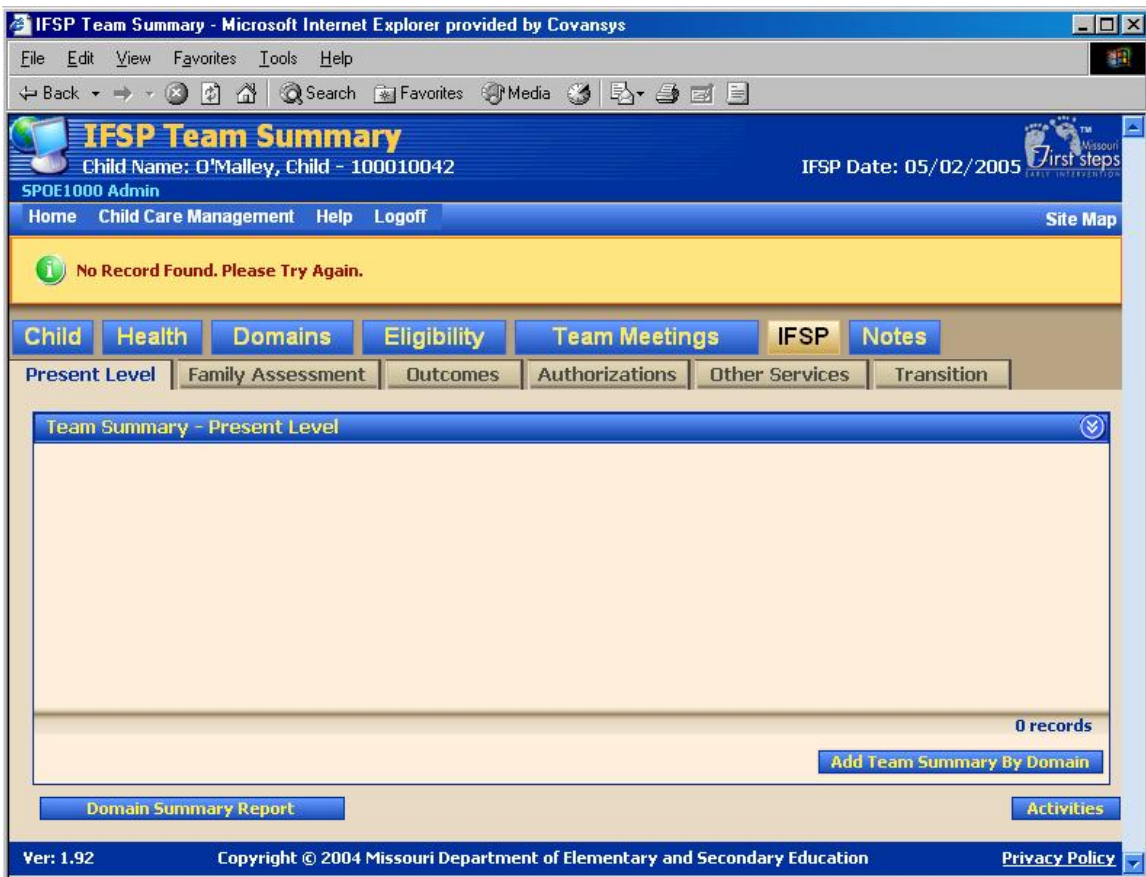
Add a Team Summary of Present Level Activity

Use this exercise to add a Team Summary of Present Level meeting activity for an IFSP team meeting.

> **Note:** A team summary must exist for each domain for all meetings to pass the meeting finalization edits.

Complete the following steps to finish this exercise:

1. On the IFSP Team Meeting Activities page, click **Team Summary of Present Level** to display the IFSP Team Summary page.

2. Click **Add Team Summary by Domain**. The Add Team Summary by Domain page displays.

3. In **Domain**, select the type of domain to summarize.

4. In **Strengths**, enter any strengths for the domain in 250 characters or less.

5. In **Concerns**, enter any concerns about the domain in 250 characters or less.

6. Click **Save**. The Add Team Summary by Domain page refreshes and indicates that the data was successfully saved.

7. Repeat steps 3-6 above to summarize additional domains.

8. Once you have completed the summary, click **Close**. The IFSP Team Summary page refreshed to display the summary information you entered.

9. Click **Activities** to return to the IFSP Team Meeting Activities page.

Tip: Once you return to the IFSP Team Meeting Activities page, a check mark is displayed next to the **Team Summary of Present Level** link to indicate that this activity has been completed.

Add a Create New Outcome Activity

Use this exercise to add a Create New Outcome meeting activity for an IFSP team meeting.

Complete the following steps to finish this exercise:

1. On the IFSP Team Meeting Activities page, click **Create New Outcome**. The IFSP Outcomes page displays.

2. In **Outcome Statement**, enter the overall goal for this outcome.

3. In **Criteria**, enter specifically what needs to occur to achieve this outcome.

4. In **Procedure**, enter the procedures that will be implemented to measure the progress achieved towards this outcome.

5. In **Timeline**, select how frequently the outcome will be measured for progress.

6. Click **Add Strategy and Activity**. The Add Strategy & Activity page displays.

7. In **Strategy**, enter the description of the strategy.

8. In **Activity**, enter the description of the activity.

9. Click **Save**.

10. Repeat steps 7-9 above to summarize additional strategies and activities.

11. Once you have finished additional strategies and activities, click **Close**. The IFSP Outcomes page refreshes to display the summary information you entered.

12. Click **Save** to return to the IFSP Team Meeting Activities page.

Tip: Once you return to the IFSP Team Meeting Activities page, a check mark is displayed next to the **Create New Outcome** link to indicate that this activity has been completed.

Review Existing Outcomes for an IFSP Team Meeting

Use this exercise to review existing outcomes that have been created for an IFSP team meeting.

Complete the following steps to finish this exercise:

1. On the IFSP Team Meeting Activities page, click **Review Existing Outcomes**. The IFSP Review Outcome page displays.

Tip: You can click the link in the **Progress Notes** column to view any Provider Progress Notes that have been created by the provider.

2. Click the radio button in the **Select** column to select the outcome to review. The IFSP Review Outcome page refreshes to show your selection.

Tip: When an outcome that has been previously reviewed is selected in the **Active Outcomes for Review** table, the **Review History** button becomes available. You can click the **Review History** button to display the review history for the outcome.

3. Click the **Review History** button.

4. View the following information in the **Review History** table on this page:

- **Outcome #** displays the ID number assigned to the outcome.

- **Review Date** displays the date on which the outcome was reviewed.

- **Team Evaluation** displays a brief description of the team's evaluation.

- **Modified** indicates whether the outcome was modified.

- **Outcome Status** displays the status of the outcome.

- **Progress Summary** displays a brief description of the outcome's progress summary.

5. Click **Close** to return to the IFSP Review Outcome page.

6. Select the **Team Evaluation**. For this exercise, select the **Outcome Partially Obtained** option.

7. Select the **Outcome Status**. For this exercise, select the **Continued as Written** option.

8. Enter the **Progress Summary** in 250 characters or less.

9. Select the **Yes** or **No** radio button in **Modification to Outcome** to indicate whether a modification was made to the outcome. For this exercise, select the **No** radio button.

> **Tip:** When **Continued as Written** is selected as the **Outcome Status**, the **No** radio button must be selected. When **Continued with changes** is selected as the **Outcome Status**, the **Yes** radio button must be selected. When **Discontinued** is selected as the **Outcome Status**, the **No** radio button must be selected.

10. Click **Save**. The IFSP Review Outcome page refreshes to show the changes you made.

Tip: Once all of the outcomes have been reviewed, modified, or discontinued, the **Active Outcomes for Review** table becomes blank on the IFSP Review Outcome page (displayed above). The **Active Outcomes for Review** table must be empty for the meeting final edits to pass when run.

11. Once you have finished reviewing outcomes, click **Activities** to return to the IFSP Team Meeting Activities page.

Delete an Existing Outcome for an IFSP Team Meeting

Use this exercise to delete existing outcomes that have been reviewed for an IFSP team meeting.

Complete the following steps to finish this exercise:

1. On the IFSP Team Meeting Activities page, click **Review Existing Outcomes**. The IFSP Review Outcome page displays.

2. Click either the **Outcomes** tab or the **Outcome List** button. The IFSP Outcomes page displays.

> **Tip:** The IFSP Outcomes page displays a list of all existing outcomes for an IFSP. Under **Search Filter**, you can select the **Show Active Only** check box to display only currently active outcomes in the **Outcome List** table. When the check box is selected or cleared, the information displayed in the **Outcome List** table is refreshed.

3. Click **Outcomes Reviewed for Meeting**. The IFSP Reviewed Outcomes page displays.

4. To delete a specific review, click the 🗑 link in the **Delete** column of the **Outcomes Reviewed for Meeting** table. A confirmation message displays confirming your request.

5. Click **OK** to delete the review. The IFSP Reviewed Outcomes page displays and refreshes to show the changes you made.

Tip: Once a reviewed outcome is deleted for an IFSP team meeting, it is once again displayed on the IFSP Review Outcome page. The following steps will walk you through the steps necessary to see the deleted outcome.

6. Click the **Team Meetings** tab. The Meeting History page displays.

7. Click the **Meeting Activities** tab. The IFSP Team Meeting Activities page displays.

8. Click the **Review Existing Outcomes** link. The IFSP Review Outcome page displays.

Tip: The outcome is again displayed in the **Active Outcomes for Review** table on the IFSP Review Outcome page (displayed above).

Modify an Existing Outcome for an IFSP Team Meeting

Use this exercise to modify an existing outcome for an IFSP team meeting.

> ✎**Note:** This exercise begins on the IFSP Review Outcome page.

Complete the following steps to finish this exercise:

1. On the IFSP Review Outcome page, click the radio button in the **Select** column to select the outcome to modify.

2. Select the **Team Evaluation**. For the purposes of this exercise, select the **Outcome Still Needed/Situation Unchanged** option.

3. Select the **Outcome Status**. For the purposes of this exercise, select the **Continued with Changes** option.

4. Enter the **Progress Summary** in 250 characters or less.

5. Select the **Yes** or **No** radio button in **Modification to Outcome** to indicate whether a modification was made to the outcome. For the purposes of this exercise, select the **Yes** radio button.

Tip: When **Continued as Written** is selected as the **Outcome Status**, the **No** radio button must be selected. When **Continued with changes** is selected as the **Outcome Status**, the **Yes** radio button must be selected. When **Discontinued** is selected as the **Outcome Status**, the **No** radio button must be selected.

6. Click **Modify Outcome**. The IFSP Outcomes page displays.

7. In **Outcome Statement**, update the overall goal for this outcome.

8. In **Criteria**, update specifically what needs to occur to achieve this outcome.

9. In **Procedure**, update the procedures that will be implemented to measure the progress achieved towards this outcome.

10. In **Timeline**, update how frequently the outcome will be measured for progress.

11. In the **Steps to Achieve Outcome** table, view the strategies and activities that were added for this outcome. You can click the 🗑 button in the **Delete** column to remove any that no longer apply.

12. To add a new strategy and activity, click **Add Strategy and Activity** and complete the following information on the Add Strategy & Activity page:

- In **Strategy**, enter the description of the strategy.

- In **Activity**, enter the description of the activity.

- Click **Save**. Repeat these steps to summarize additional strategies and activities.

- Click **Close**. The IFSP Outcomes page refreshes to display the summary information you entered.

13. Click **Save**. The IFSP Review Outcome page displays and refreshes to show the changed you made.

Tip: Once all of the outcomes have been reviewed, modified, or discontinued, the **Active Outcomes for Review** table becomes blank on the IFSP Review Outcome page (displayed above). The **Active Outcomes for Review** table must be empty for the meeting final edits to pass when run.

Discontinue an Existing Outcome for an IFSP Team Meeting

Use this exercise to discontinue an existing outcome for an IFSP team meeting.

> **Note:** This exercise begins on the IFSP Review Outcome page.

Complete the following steps to finish this exercise:

1. On the IFSP Review Outcome page, click the radio button in the **Select** column to select the outcome to discontinue.

2. Select the **Team Evaluation**. For the purposes of this exercise, select the **Outcome Accomplished** option.

3. Select the **Outcome Status**. For the purposes of this exercise, select the **Discontinued** option. The page refreshed based on the selection you made.

Tip: When **Discontinued** is selected as the **Outcome Status**, page refreshes and displays the **Outcome End Date**. This information is read-only and cannot be changed.

4. Enter the **Progress Summary** in 250 characters or less.

5. Select the **Yes** or **No** radio button in **Modification to Outcome** to indicate whether a modification was made to the outcome. For the purposes of this exercise, select the **Yes** radio button.

Tip: When **Continued as Written** is selected as the **Outcome Status**, the **No** radio button must be selected. When **Continued with changes** is selected as the **Outcome Status**, the **Yes** radio button must be selected. When **Discontinued** is selected as the **Outcome Status**, the **No** radio button must be selected.

6. Click **Save**. The IFSP Review Outcome page displays and refreshes to show the changed you made.

Tip: Once all of the outcomes have been reviewed, modified, or discontinued, the **Active Outcomes for Review** table becomes blank on the IFSP Review Outcome page (displayed above). The **Active Outcomes for Review** table must be empty for the meeting final edits to pass when run.
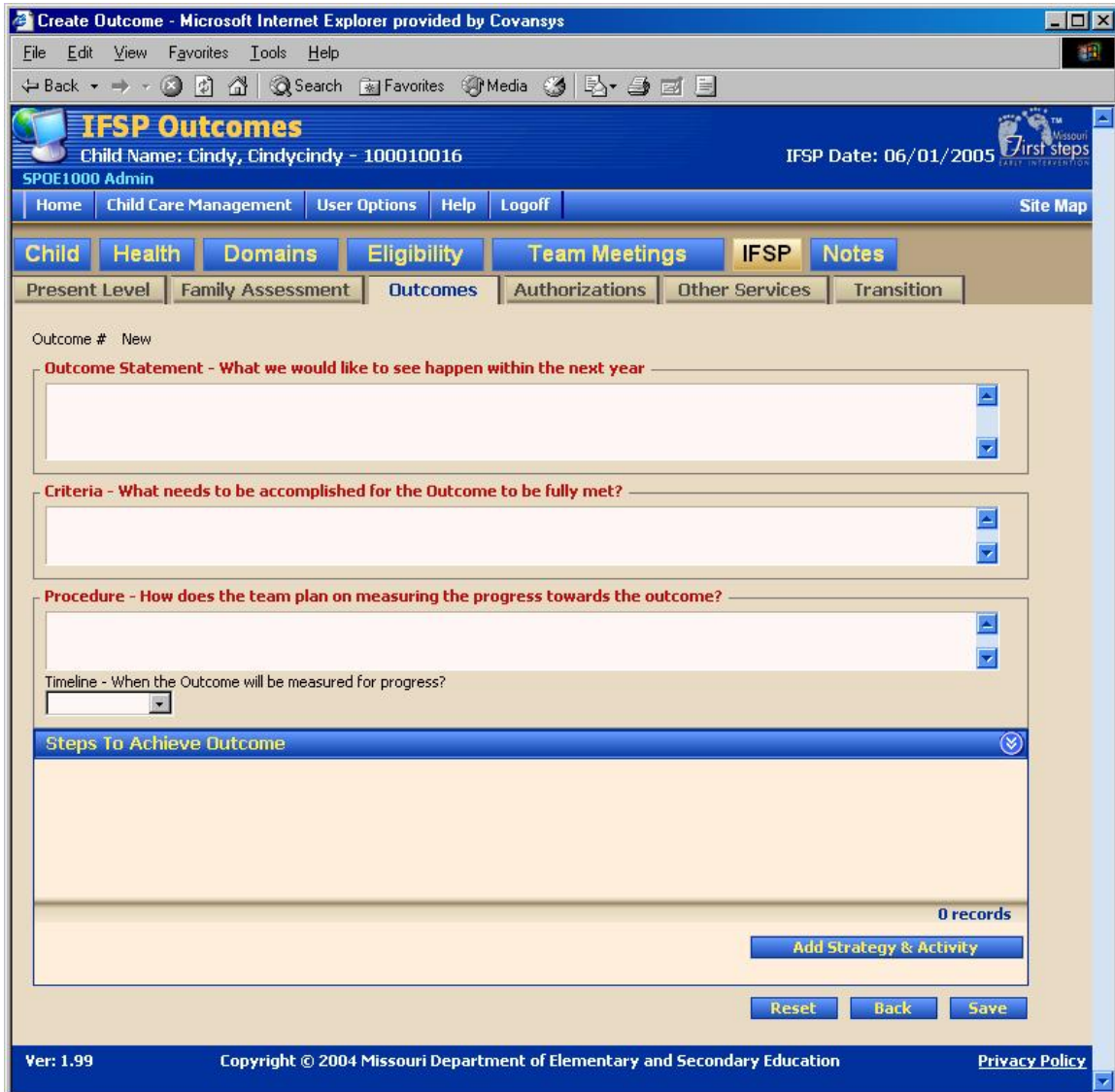
Create a New Outcome while Reviewing Outcomes

Use this exercise to create a new outcome while reviewing existing outcomes on the IFSP Review Outcome page.

> **Note:** This exercise begins on the IFSP Review Outcome page.

Complete the following steps to finish this exercise:
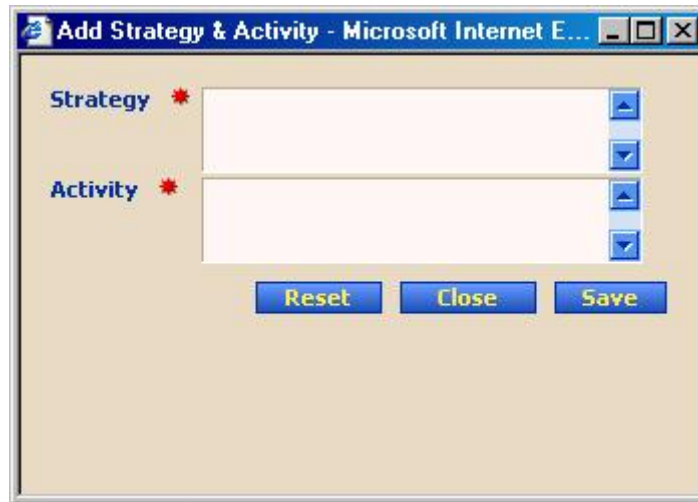
1. On the IFSP Review Outcome page, click **Create Outcome**. The IFSP Outcomes page displays.

2. In **Outcome Statement**, enter the overall goal for this outcome.

3. In **Criteria**, enter specifically what needs to occur to achieve this outcome.

4. In **Procedure**, enter the procedures that will be implemented to measure the progress achieved towards this outcome.

5. In **Timeline**, select how frequently the outcome will be measured for progress.

6. Click **Add Strategy and Activity**. The Add Strategy & Activity page displays.

7. In **Strategy**, enter the description of the strategy.

8. In **Activity**, enter the description of the activity.

9. Click **Save**.

10. Repeat steps 7-9 above to summarize additional strategies and activities.

11. Once you have finished additional strategies and activities, click **Close**. The IFSP Outcomes page refreshes to display the summary information you entered.

12. Click **Save** to return to the IFSP Team Meeting Activities page.

Add a Parental Consent for IFSP Services Activity

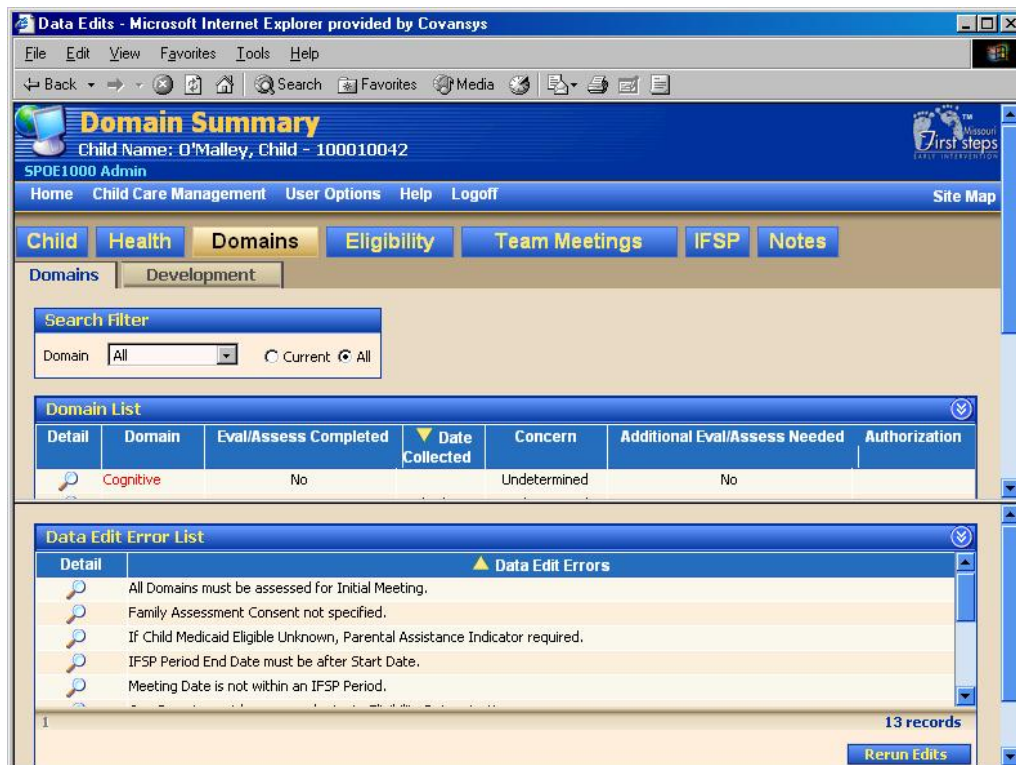Use this exercise to add a Parental Consent for IFSP Services meeting activity for an IFSP team meeting.

Complete the following steps to finish this exercise:

1. On the IFSP Team Meeting Activities page, click **Parental Consent for IFSP Services**. The Parental Consent for IFSP Services page displays.
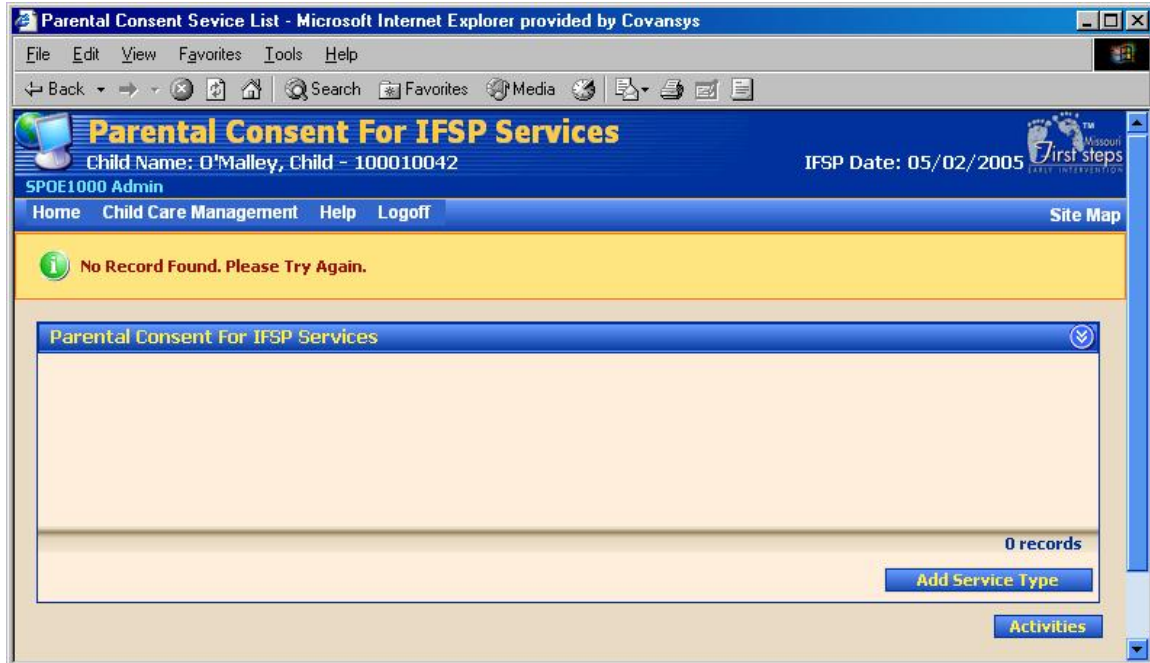
2. Click **Add Service Type**. The Parental Consent Service Detail page displays.

3. Select the **Service Type**.

> **Note:** Only services approved by the child's parents are available **Service Type** options when creating service authorizations.

4. Enter or select the **Date**. You can click the �â icon to select a date from a calendar.

5. Select the **Approved** or **Declined** radio button in **Action** to indicate whether the parent approved or declined the service.

6. Click **Save**. The Parental Consent Service Detail page refreshes to indicate that the data was saved successfully.

7. Repeat steps 3-6 above to enter consensual information additional IFSP services.

8. Once you have finished entering consensual information IFSP services, click **Close**. The Parental Consent for IFSP Services page refreshes and displays the information you entered.

9. Click **Activities** to return to the IFSP Team Meeting Activities page.

> **Tip:** Once you return to the IFSP Team Meeting Activities page, a check mark is displayed next to the **Parental Consent for IFSP Services** link to indicate that this activity has been completed.

Add an IFSP Authorizations Activity

Use this exercise to add an IFSP Authorizations meeting activity for an IFSP team meeting.

Complete the following steps to finish this exercise:

1. On the IFSP Team Meeting Activities page, click **IFSP Authorizations**. The Authorizations page displays.

2. Click **Add Authorization**. The New Authorization (Page 1) page displays.

Note: This exercise will show you how to create an Assistive Technology service authorization. The steps that follow are specific to creating Assistive Technology service authorization type.

3. In **Authorization Type**, select **Service** as the type for the authorization. The page refreshed based on the **Authorization Type** selected.

4. In **Service Type**, select **Assistive Technology** as the service type for the authorization.

5. Click the check box in the **Select** column to select an outcome.

6. Click **Next**. The New Authorization (Page 2) page displays.

7. In **Active Date**, enter or select the starting date for the authorization. You can click the ✧ icon to select a date from a calendar.

8. In **To**, enter or select the ending date for the authorization. You can click the ✧ icon to select a date from a calendar.

9. In **Funding Source**, select the funding source for the authorization.

10. In **Compensatory Service**, indicate whether the authorization is currently a compensatory service.

11. Click the 🔍 icon next to **HCPCS** to search for a specific HPCPS code. The HCPCS Lookup page displays.
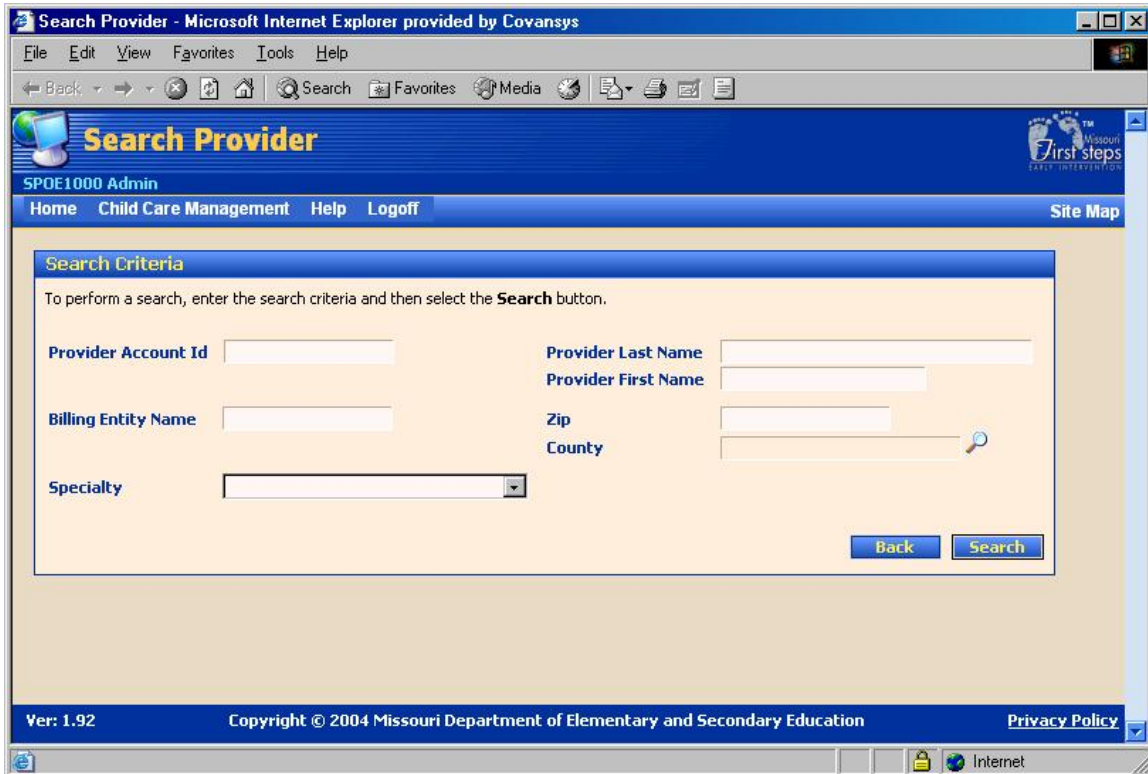
12. Complete information in one of the following fields to perform an HCPCS code search:

- Enter a complete **HCPCS Code** to perform a search by HCPCS code. A complete code must be entered to perform a search by HCPCS code.

- Enter an **HCPCS Description** to perform a search by HCPCS description. You must enter at least two characters to perform a search by HCPCS description.

13. Click **Search**. The information displayed in the **HCPCS List** table refreshes to display the HCPCS codes that match the filter criteria specified.

14. Click the link in the **Select** column to select a specific code and return to the New Authorization (Page 2) page. The page is refreshed and displays the **HCPCS Code** and **Description** based on your selection.

15. In **User Description**, enter a description of the user for the authorization.

16. In **Type**, select the type of service being used for the authorization.

17. In **Quantity**, enter the number of units necessary for the authorization.

18. In **Price**, enter the price per unit for the authorization.

> **Tip: Total Amount** displays the total dollar amount for the authorization. This information is read-only and cannot be changed.

19. In **Comments**, enter any additional comments about the authorization.

> ✎**Note:** You must specify **either NPA Provider** or **Provider** to complete the
> authorization. Selecting the **Provider** radio button will clear any information selected in
> the **NPA Provider** drop-down lists. To specify an NPA provider, click the **NPA**
> **Provider** radio button, then select a **Specialty** and an **NPA Reason**. This exercise will
> show you how to specify a provider. The steps that follow will show you how to specify
> a provider for the authorization.

20. Click the 🔍 icon next to **Account ID** to search for a specific provider. The
    Search Provider page displays.

21. Enter or select information in one or more of the following fields to perform
    a provider search:

    - Provider ID (a complete provider ID number must be entered)

    - Provider Last Name (a minimum of 2 characters must be entered to
      perform a search by last name)

    - Provider First Name

    - Billing Entity Name (a minimum of 2 characters must be entered to
      perform a search by billing entity name)

    - Zip (at least 3 digits must be entered to perform a search by zip
      code)

    - County (click the 🔍 icon to display the County Search page)

    - Specialty

22. Click **Search** to perform a search based on the specified filter criteria. The Provider List page displays a list of providers that match the filter criteria specified.

23. Click the link in the **Select** column to select a specific provider and return to the New Authorization (Page 2) page. The page is refreshed and displays the following information under **Provider** based on your selection:

- Account ID
- Payee Name
- First Name
- MI
- Last Name
- Phone
- Specialty

24. Click **Save**. The Authorizations page refreshes and displays the authorization you entered.

25. Click **Activities** to return to the IFSP Team Meeting Activities page.

Tip: Once you return to the IFSP Team Meeting Activities page, a check mark is displayed next to the **IFSP Authorizations** link to indicate that this activity has been completed.

Add an Other Services Activity

Use this exercise to add an Other Services meeting activity for an IFSP team meeting.

Complete the following steps to finish this exercise:

1. On the IFSP Team Meeting Activities page, click **Other Services**. The IFSP Other Services page displays.
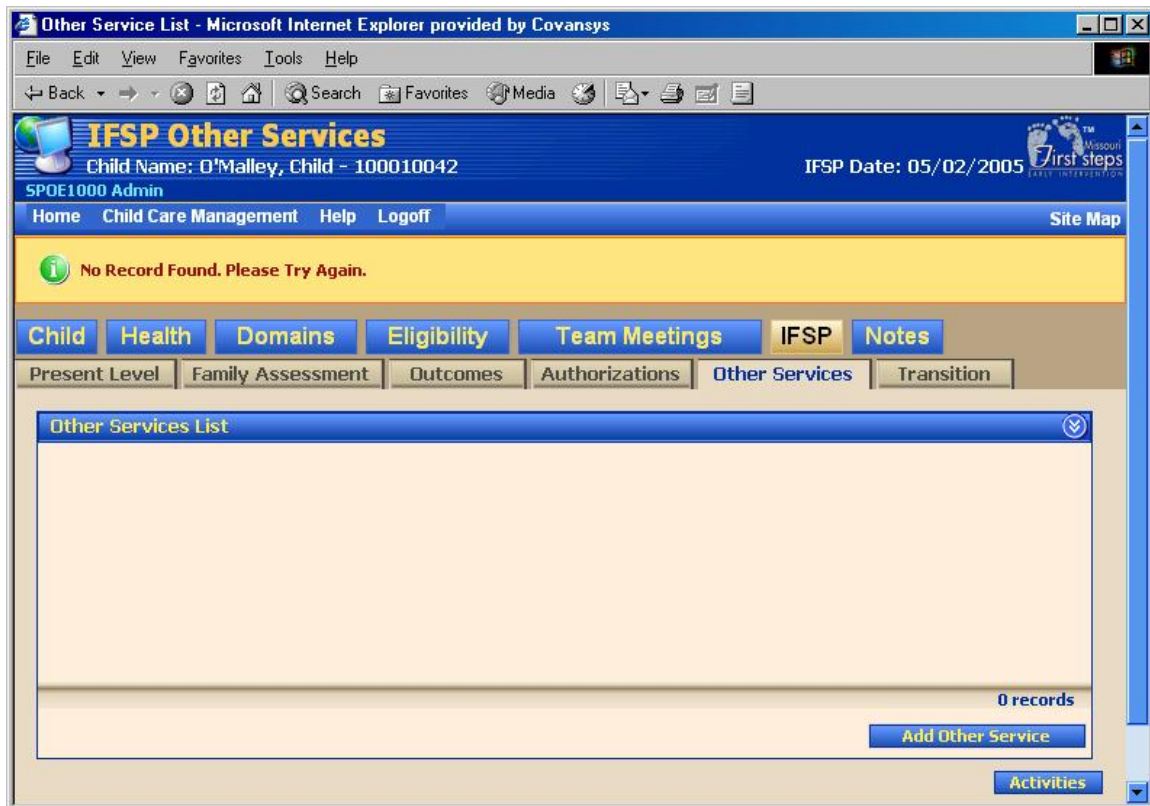
2. Click **Add Other Service**. The IFSP Add Other Service page displays.

3. Click the check box in the **Select** column to select an outcome.

4. In **Service Description**, enter or update the description of the service in 100 characters or less.

5. In **Outcome #**, select one or more of the currently active outcomes defined for the IFSP.

6. In **Start Date**, enter or select the date on which the service begins. You can click the ⬧ icon to select a date from a calendar.

7. In **End Date**, enter or select the date on which the service ends. You can click the ⬧ icon to select a date from a calendar.

8. In **Funding Source**, enter or update a description of the funding source for the service.

9. In **Responsible Person**, enter or update the name of the person who is responsible for delivering the service.

10. In **Notes**, enter or update any additional notes about the service in 250 characters or less.

11. Click **Save**. The IFSP Other Services page refreshes and displays the service you entered.

12. Click **Activities** to return to the IFSP Team Meeting Activities page.

Add a Meeting Notes Activity

Use this exercise to add a Meeting Notes meeting activity for an IFSP team meeting.

Complete the following steps to finish this exercise:

1. On the IFSP Team Meeting Activities page, click **Meeting Notes**. The IFSP Meeting Notes page displays.

2. Click **Add Notes**. The IFSP Meeting Notes Detail page displays.

3. Enter the **Topic** of the note in 50 characters or less.

4. Enter the **Note Detail** in 1000 characters or less.

5. Click **Save**. The IFSP Meeting Notes Detail page refreshes to indicate that the data was saved successfully.

6. Repeat steps 3-6 above to enter additional IFSP meeting notes.

7. Once you have finished entering IFSP meeting notes, click **Close**. The IFSP Meeting Notes page refreshes and displays the information you entered.

8. Click **Activities** to return to the IFSP Team Meeting Activities page.

Tip: Once you return to the IFSP Team Meeting Activities page, a check mark is displayed next to the **Meeting Notes** link to indicate that this activity has been completed.

Add a Transition Information Activity

Use this exercise to add a Transition Information meeting activity for an IFSP team meeting.

Transition From Topics:	Topic Short Description For List
*Discussion with, and training of parents regarding future placements and other matters related to the child's transition. ***Required at every IFSP initial and Annual meeting until the child's age is 2.5 years. Then required at every (Initial, Annual, 6 Month Review, Inter-periodic) meeting until child exits the program.***	Discussion with and Training of Parents
*Discussion about procedures to prepare the child for changes in service delivery including steps to help the child adjust and function in a new setting. ***(Required at every meeting when the child's age is 2.5 years or greater until the child exits the program).***	Discussion about changes in Service Delivery
Send with parental consent, information about the child to the local education agency to ensure continuity of services including evaluation and assessment of information and IFSPs. ***(Required at every Meetings when the child's age is 2.5 years or greater until the child exits the program).***	Sent info to Local Education Agency with Parental Consent
Send specified information to community programs, upon informed, written consent, to facilitate service delivery or transition from the First Steps early intervention system. ***(Required at every Meetings when the child's age is 2.5 years or greater until the child exits the program).***	Sent info to Community Programs with Parental Consent
Other Transition From Topic	Other Transition Topic

Transition Into/Within Topics	Short Description
Transition from hospital, neonatal intensive care unit to home, and into early intervention services to ensure that no disruption occurs in necessary services	Transition from Hospital/NICU
Family related changes that may affect IFSP service delivery (I.e., employment, birth or adoption of sibling, medical needs of other family members)	Family Related Changes
Child related changes that may affect IFSP service delivery (I.e., hospitalization or surgery, placement in a child care program, addition of new equipment or technology, medication changes)	Child Related Changes
Introduction of new or a change in Service Provider(s) or Service location(s)	Service Provider (New or Change)
Termination of existing IFSP service	Termination of IFSP service
Explore community program options for our Child or Family	Explore Community Programs
Child and Family exiting First Steps system due to Loss of eligibility or Family does not consent to participate	Child and Family Exiting First Steps
Other Transition Topic	Other Transition Topic

Complete the following steps to finish this exercise:

1. On the IFSP Team Meeting Activities page, click **Transition Information**. The IFSP Transition page displays.

2. Click **Add Transition Into/Within Topic** or click **Add Transition From Topic**. The IFSP Transition Detail page displays.

3. In **Transition Topics**, select the transition topic ID.

4. In **Who is Responsible**, enter the name of the person responsible for the transition activity in 65 characters or less.

5. In **Transition Steps/Activities**, enter the steps, responsibilities, and activities that must be completed for this transition in 250 characters or less.

6. Click **Save**. The IFSP Transition page refreshes to display the transition information entered.

7. Click **Activities** to return to the IFSP Team Meeting Activities page.

Tip: Once you return to the IFSP Team Meeting Activities page, a check mark is displayed next to the **Transition Information** link to indicate that this activity has been completed.

Add a Team Communications Activity

Use this exercise to add a Team Communications meeting activity for an IFSP team meeting.

Complete the following steps to finish this exercise:

1. On the IFSP Team Meeting Activities page, click **Team Communications**. The IFSP Team Communications page displays.

2. In **Family Communications**, enter information that documents the amount and type of communication strategies agreed upon so that the expectations are clear to both the family/care giver(s) and the service coordinator.

3. in **Team Communications**, enter methods of keeping in touch with team members, including telephone calls, progress reports and routine correspondence information.

4. Click **Save** to return to the IFSP Team Meeting Activities page.

Tip: Once you return to the IFSP Team Meeting Activities page, a check mark is displayed next to the **Team Communications** link to indicate that this activity has been completed.

Add a Next Meeting Activity

Use this exercise to add a Next Meeting activity for an IFSP team meeting.

Complete the following steps to finish this exercise:

1. On the IFSP Team Meeting Activities page, click **Next Meeting**. The Team Meeting Planner page displays.

> **Note:** Creating a Next Meeting activity allows you to enter information for and plan the next team meeting for the child.

2. In **Primary Meeting Type**, select a type for the IFSP team meeting. If this meeting has already been scheduled, this information is read-only and cannot be changed.

3. **Meeting Status** displays the current status of the IFSP team meeting. This information is read-only and cannot be changed.

4. Click the **Transition** check box to indicate that the IFSP team meeting is a transition meeting as necessary.

5. Click the **Part B** check box to indicate that the IFSP team meeting is a Part B meeting as necessary.

6. Click the **Compensatory** check box to indicate that the IFSP team meeting is a compensatory meeting as necessary.

7. In **Meeting Date**, enter or select the date on which the IFSP team meeting will occur. You can click the 🔹 icon to select a date from a calendar.

8. In **Time**, enter the time at which the IFSP team meeting will occur in HH:MM AM/PM format.

9. In **Meeting Duration**, enter the duration of the IFSP team meeting in minutes.

10. In **Location Address**, enter the address information for the location at which the IFSP team meeting will occur in 250 characters or less.

11. In **Location Description**, enter a brief description of the location at which the IFSP team meeting will occur in 250 characters or less.

12. In **Meeting Agenda**, enter a brief agenda for the IFSP team meeting in 500 characters or less.

13. In the **Team Meeting Member List**, a list of members from a previously finalized team meeting are displayed. You can remove a member by clicking the link in the **Remove** column, or you can add a new team member to the table by clicking **Add Team Meeting Member**.

14. If **Add Team Meeting Member** is clicked, the Add Team Meeting Member page displays. Complete the following to add a new team member to the **Team Meeting Member List** table:

   - Click the check box in the **Select** column to add one or more team members to the IFSP team meeting.

   - Click **Save** to add the selected team member(s) and return to the Team Meeting Planner page.

15. Click the check box in the **Notified** column to indicate that an invitation has already been sent to the team member for the IFSP team meeting as necessary.

16. Click **Save** to save the meeting information and place the meeting in tentative status.

17. Click **Activities** to return to the IFSP Team Meeting Activities page.

> 📌**Tip:** Once you return to the IFSP Team Meeting Activities page, a check mark is displayed next to the **Next Meeting** link to indicate that this activity has been completed.

Review Delivered Services

Use this exercise to review a list of services delivered for an IFSP team meeting.

Complete the following steps to finish this exercise:

1. On the IFSP Team Meeting Activities page, click **Delivered Service(s) (Optional)**. The IFSP Delivered Service Review page displays.

2. In **Date of Service**, enter or select the starting date of the service to include. You can click the 🖑 icon to select a date from a calendar.

3. In **To**, enter or select the ending date of the service to include. You can click the 🖑 icon to select a date from a calendar.

4. Click **Search**. The **Delivered Services List** table refreshes to display the services that were delivered within the date range specified.

5. Click **Activities** to return to the IFSP Team Meeting Activities page.

> 🖑**Tip:** Once you return to the IFSP Team Meeting Activities page, a check mark is displayed next to the **Delivered Service(s) (Optional)** link to indicate that this activity has been completed.

Add a Finalize Meeting Activity

Use this exercise to add a Finalize Meeting activity for an IFSP team meeting.

Complete the following steps to finish this exercise:

1. On the IFSP Team Meeting Activities page, click **Finalize Meeting**. A message box displays confirming your request.

2. Click **OK** or **Cancel** to continue. If **OK** is clicked, finalized meeting edits are processed. If errors are found during this process, the **Data Edit Errors** page displays (an example is displayed below). If no errors are found during this process, a message displays indicating that the finalized meeting edits were successful. After the finalized edits have been run successfully, meeting information is displayed in a read-only mode. If **Cancel** is selected, the finalized meeting edits are not processed. Once a meeting has been finalized, the **Finalize Meeting** link is disabled and a check mark is displayed next to the **Finalize Meeting** link on the IFSP Team Meeting Activities.

View the IFSP Team Summary List

Use this exercise to see how to view a list of team summaries.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔎 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **IFSP** tab. The IFSP Team Summary page displays.

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3. View the list of team summaries in the **Team Summary - Present Level** table.

Tip: You can click the 🔍 icon in the **Detail** column to view detailed team summary information. The Add Team Summary by Domain page displays when clicked.

View the Family Assessment

Use this exercise to see how to view a list of team summaries.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **IFSP** tab. The IFSP Team Summary page displays.

3. Click the **Family Assessment** tab. The Family Assessment page displays.

4. View the family assessment information displayed.

View the IFSP Outcomes List

Use this exercise to view a list of IFSP outcomes.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **IFSP** tab. The IFSP Team Summary page displays.

3. Click the **Outcomes** tab. The IFSP Outcomes page displays.

Tip: Under **Search Filter**, you can select the **Show Active Only** check box to display only currently active outcomes in the **Outcome List** table. When the check box is selected or cleared, the information displayed in the **Outcome List** table is refreshed.

4. View the list of outcomes displayed in the **Outcome List** table.

Tip: You can click the 🔍 icon in the **Detail** column to view detailed outcome information. The IFSP Create Outcome page displays when clicked. The information displayed on the IFSP Create Outcome page can be updated until a meeting status is Finalized. For meetings in Finalized status, the information is displayed in read-only mode.

View the Authorizations List

Use this exercise to view a list of authorizations.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔎 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **IFSP** tab. The IFSP Team Summary page displays.

3. Click the **Authorizations** tab. The Authorizations page displays.

Tip: Under **Search Filter**, you can select the **Show Meeting Specific** check box to display only those authorizations that are specific to the current team meeting in the **Authorization List** table. When the check box is selected or cleared, the information displayed in the **Authorization List** table is refreshed.

4. View the list of authorizations displayed in the **Authorization List** table.

Tip: You can click the 🔍 icon in the **Detail** column to view detailed authorization information. The View Authorization Detail page displays when clicked.

Create an Evaluation/Assessment Authorization

Use this exercise to create an evaluation/assessment authorization.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **IFSP** tab. The IFSP Team Summary page displays.

3. Click the **Authorizations** tab. The Authorizations page displays.

4. Click **Add Authorization**. The New Authorizations (Page 1) page displays.

5. Select **Evaluation/Assessment** as the **Authorization Type**. The page refreshed based on the **Authorization Type** selected.

6. In **Service Type**, select the service type for the authorization.

7. Under **Evaluation/Assessment is Needed for**, select either the **Eligibility Determination** or the **IFSP Development** radio button as necessary.

8. Under **Select Related Domain(s)**, select one or more of the domain check boxes related to the evaluation or assessment to be performed for the child.

9. Click **Next**. The New Authorizations (Page 2) page displays.

10. In **Active Date**, enter or select the starting date for the authorization. You can click the 🖑 icon to select a date from a calendar.

11. In **To**, enter or select the ending date for the authorization. You can click the 🖑 icon to select a date from a calendar.

12. In **Funding Source**, select the funding source for the authorization.

13. In **Compensatory Service**, indicate whether the authorization is currently marketed as a compensatory service.

14. In **Method/Location**, select a description for the authorization.

15. In **Frequency/Per**, enter/select how often the service is authorized to be performed.

16. In **Intensity**, the duration of the service in minutes.

17. In **Comments**, enter any additional comments about the authorization.

> ✎**Note:** You must specify **either NPA Provider** or **Provider** to complete the authorization. Selecting the **Provider** radio button will clear any information selected in the **NPA Provider** drop-down lists. To specify an NPA provider, click the **NPA Provider** radio button, then select a **Specialty** and an **NPA Reason**. This exercise will show you how to specify a provider. The steps that follow will show you how to specify a provider for the authorization.

18. Click the 🔍 icon next to **Account ID** to search for a specific provider. The Search Provider page displays.

19. Enter or select information in one or more of the following fields to perform a provider search:

- Provider ID (a complete provider ID number must be entered)

- Provider Last Name (a minimum of 2 characters must be entered to perform a search by last name)

- Provider First Name

- Billing Entity Name (a minimum of 2 characters must be entered to perform a search by billing entity name)

- Zip (at least 3 digits must be entered to perform a search by zip code)

- County (click the 🔍 icon to display the County Search page)

- Specialty

20. Click **Search** to perform a search based on the specified filter criteria. The Provider List page displays a list of providers that match the filter criteria specified.

21. Click the link in the **Select** column to select a specific provider and return to the New Authorization (Page 2) page. The page is refreshed and displays the following information under **Provider** based on your selection:

- Account ID

- Payee Name

- First Name

- MI

- Last Name

- Phone

- Specialty

22. Click **Save**. The Authorizations page refreshes and displays the authorization you entered.

Create a Team Meeting Authorization

Use this exercise to create a team meeting authorization.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **IFSP** tab. The IFSP Team Summary page displays.

3. Click the **Authorizations** tab. The Authorizations page displays.

4. Click **Add Authorization**. The New Authorizations (Page 1) page displays.

5. Select **Team Meeting** as the **Authorization Type**.

6. In **Service Type**, select the service type for the authorization.

7. Click **Next**. The New Authorizations (Page 2) page displays.

8. In **Active Date**, enter or select the starting date for the authorization. You can click the 📅 icon to select a date from a calendar.

9. In **To**, enter or select the ending date for the authorization. You can click the 📅 icon to select a date from a calendar.

10. In **Funding Source**, select the funding source for the authorization.

11. In **Compensatory Service**, indicate whether the authorization is currently marketed as a compensatory service.

12. In **Method/Location**, select a description for the authorization.

13. In **Frequency/Per**, enter/select how often the service is authorized to be performed.

14. In **Intensity**, the duration of the service in minutes.

15. In **Comments**, enter any additional comments about the authorization.

> ✎**Note:** You must specify **either NPA Provider** or **Provider** to complete the
> authorization. Selecting the **Provider** radio button will clear any information selected in
> the **NPA Provider** drop-down lists. To specify an NPA provider, click the **NPA**
> **Provider** radio button, then select a **Specialty** and an **NPA Reason**. This exercise will
> show you how to specify a provider. The steps that follow will show you how to specify
> a provider for the authorization.

16. Click the 🔎 icon next to **Account ID** to search for a specific provider. The
    Search Provider page displays.

17. Enter or select information in one or more of the following fields to perform
    a provider search:

    - Provider ID (a complete provider ID number must be entered)
    - Provider Last Name (a minimum of 2 characters must be entered to
      perform a search by last name)
    - Provider First Name
    - Billing Entity Name (a minimum of 2 characters must be entered to
      perform a search by billing entity name)
    - Zip (at least 3 digits must be entered to perform a search by zip
      code)
    - County (click the 🔎 icon to display the County Search page)
    - Specialty

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18. Click **Search** to perform a search based on the specified filter criteria. The Provider List page displays a list of providers that match the filter criteria specified.

19. Click the link in the **Select** column to select a specific provider and return to the New Authorization (Page 2) page. The page is refreshed and displays the following information under **Provider** based on your selection:

   - Account ID
   - Payee Name
   - First Name
   - MI
   - Last Name
   - Phone
   - Specialty

20. Click **Save**. The Authorizations page refreshes and displays the authorization you entered.

Perform Authorization Maintenance (Change Service Provider)

Use this exercise to perform maintenance tasks on an authorization.

> ✎**Note:** This option is available anytime the authorization is active or has a future start date and has not been canceled.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **IFSP** tab. The IFSP Team Summary page displays.

3. Click the **Authorizations** tab. The Authorizations page displays.

4. Click the [A] icon in the **Detail** column for a specific authorization. The View Authorization Detail page displays.

5. Click **Authorization Maintenance**. The Authorization Maintenance page displays.

6. In the **Modify Authorizations** drop down list, select the task to perform. For this exercise, select the **Change Service Provider** option. The page is refreshed based on the selection made.

7. Click the 🔍 icon next to **Provider Acct #**. The [Search Provider](#) page displays.

8. Enter or select information in one or more of the following fields to perform a search:

- Provider ID (a complete provider ID number must be entered)

- Provider Last Name (a minimum of 2 characters must be entered to perform a search by last name)

- Provider First Name

- Billing Entity Name (a minimum of 2 characters must be entered to perform a search by billing entity name)

- Zip

- County (selected by County Search)

- Specialty

Note: For this exercise, select the **Physical Therapist** option in the **Specialty** drop-down list.

9. Click **Search** to perform a search based on the specified filter criteria. The Provider List page displays.

10. Click the link in the **Select** column to select a specific provider. The
    Authorization Maintenance page displays and refreshes to show the
    provider selection you made.

11. In **Change Provider Date**, enter or select the date on which the provider will be changed. The date entered must be a future date.

12. Click **Save**. The View Authorization Detail page is displayed and refreshed to show the changes you made.

Note: Error correction is possible as long as the **Change Provider Date** is in the future. If an error is found, the provider may be changed again to the correct provider. Based on the effective date, the last provider added is the one that will be able to bill on the authorization (as long as the start date is the same or prior to the start date for the initial provider change).

Perform Authorization Maintenance (Add a Covering Provider)

Use this exercise to perform maintenance tasks on an authorization.

> ✎**Note:** This option is available anytime the authorization is active or has a future start date and has not been canceled.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **IFSP** tab. The IFSP Team Summary page displays.

3. Click the **Authorizations** tab. The Authorizations page displays.

4. Click the [A] icon in the **Detail** column for a specific authorization. The View Authorization Detail page displays.

5. Click **Authorization Maintenance**. The Authorization Maintenance page displays.

6. In the **Modify Authorizations** drop down list, select the task to perform. For this exercise, select the **Add a Covering Provider** option. The page is refreshed based on the selection made.

7. Click the 🔍 icon next to **Provider Acct #**. The Search Provider page displays.

8. Enter or select information in one or more of the following fields to perform a search:

   - Provider ID (a complete provider ID number must be entered)

   - Provider Last Name (a minimum of 2 characters must be entered to perform a search by last name)

   - Provider First Name

   - Billing Entity Name (a minimum of 2 characters must be entered to perform a search by billing entity name)

   - Zip

   - County (selected by County Search)

   - Specialty

Note: For this exercise, select the **Physical Therapist** option in the **Specialty** drop-down list.

9. Click **Search** to perform a search based on the specified filter criteria. The Provider List page displays.

10. Click the link in the **Select** column to select a specific provider. The
Authorization Maintenance page displays and refreshes to show the
provider selection you made.

11. In **Covering Dates**, enter or select the starting and ending dates for which the provider will be covering the authorization.

> ✎**Note:** The date range cannot exceed 21 days or a consecutive three-week period. Only one active covering provider is allowed at one time on an authorization. The covering date range must contain a start date in the future based on today's date.

12. Click **Save**. The View Authorization Detail page is displayed and refreshed to show the changes you made.

Note: Error correction is available for the covering provider if another covering provider is added to the authorization with a covering start date that is prior to the start date of the original covering provider. The system will remove the previous covering provider in this situation. The image below shows a correction made to the original covering provider displayed on the image above. The start date was prior to the original covering provider's start date.

Perform Authorization Maintenance (Cancel an Authorization)

Use this exercise to perform maintenance tasks on an authorization.

> ✍**Note:** Eval/Assess authorizations can be canceled outside of a meeting. Service authorizations can be canceled only when an IFSP Team Meeting is ongoing.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **IFSP** tab. The IFSP Team Summary page displays.

3. Click the **Authorizations** tab. The Authorizations page displays.

4. Click the ⊞ icon in the **Detail** column for a specific authorization. The View Authorization Detail page displays.

5. Click **Authorization Maintenance**. The <u>Authorization Maintenance</u> page displays.

6. In the **Modify Authorizations** drop down list, select the task to perform. For this exercise, select the **Cancel Authorization** option. The page is refreshed based on the selection made.

7. In **Cancel Date**, enter or select the date on which to cancel the authorization.

> ✐**Note:** The date entered must be equal to or greater than the authorization start date and less than or equal to the authorization end date.

8. Click **Save**. The View Authorization Detail page is displayed and refreshed to show the changes you made.

View Authorization Detail - Microsoft Internet Explorer provided by Covansys

File   Edit   View   Favorites   Tools   Help

Back   Search   Favorites   Media

View Authorization Detail
Child Name: Chocolate, Carmel - 100010131

SPOE1000 Admin

| Home | Child Care Management | User Options | Help | Logoff | | Site Map |

Authorization #	A100010131-3	**Authorization Status**	Discontinued
Service Type	Occupational Therapy	**Dates**	05/26/2005 To 06/30/2005
Authorization Type	Eval/Assessment	**Eff. Cancel Date**	06/10/2005
Compensatory Service	No	**NPA Reason**	No Provider In Area
E/A Type	IFSP Development	**Domains**	Cognitive, Adaptive
Comments			

Authorization Maintenance List

Maintenance Type	▼ Period	Name
Authorization Cancelled	06/10/2005 - 06/30/2005	
Funding Source	05/26/2005 - 06/30/2005	CFO
Primary Provider	05/26/2005 - 06/30/2005	NPA

1   **3 records**

Authorization Line

EI Code	Method/Location	Natural Environment Justification	Frequency	Intensity
4514	Evaluation/Assessment/Home		1 / Per Auth	45

Back
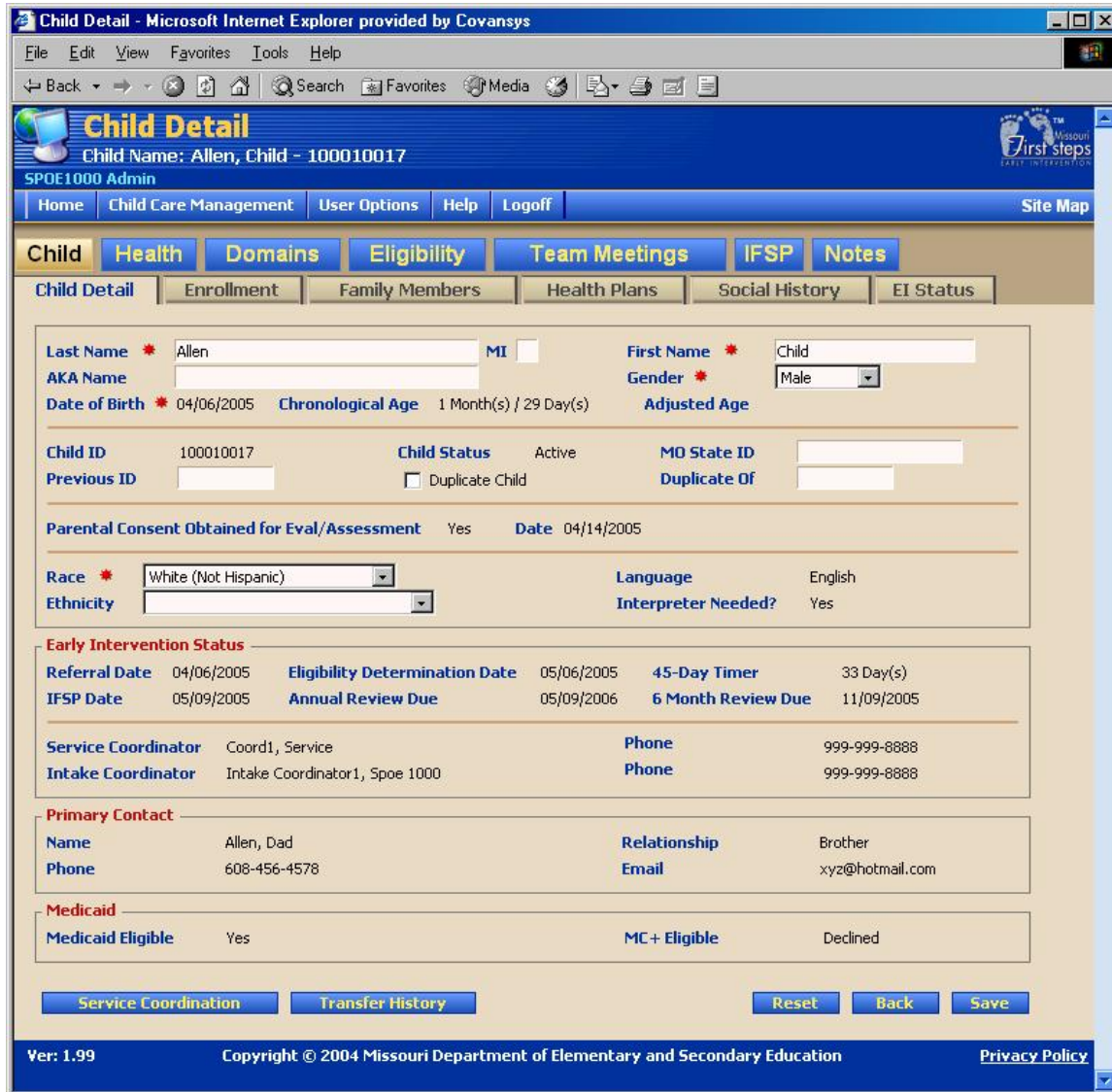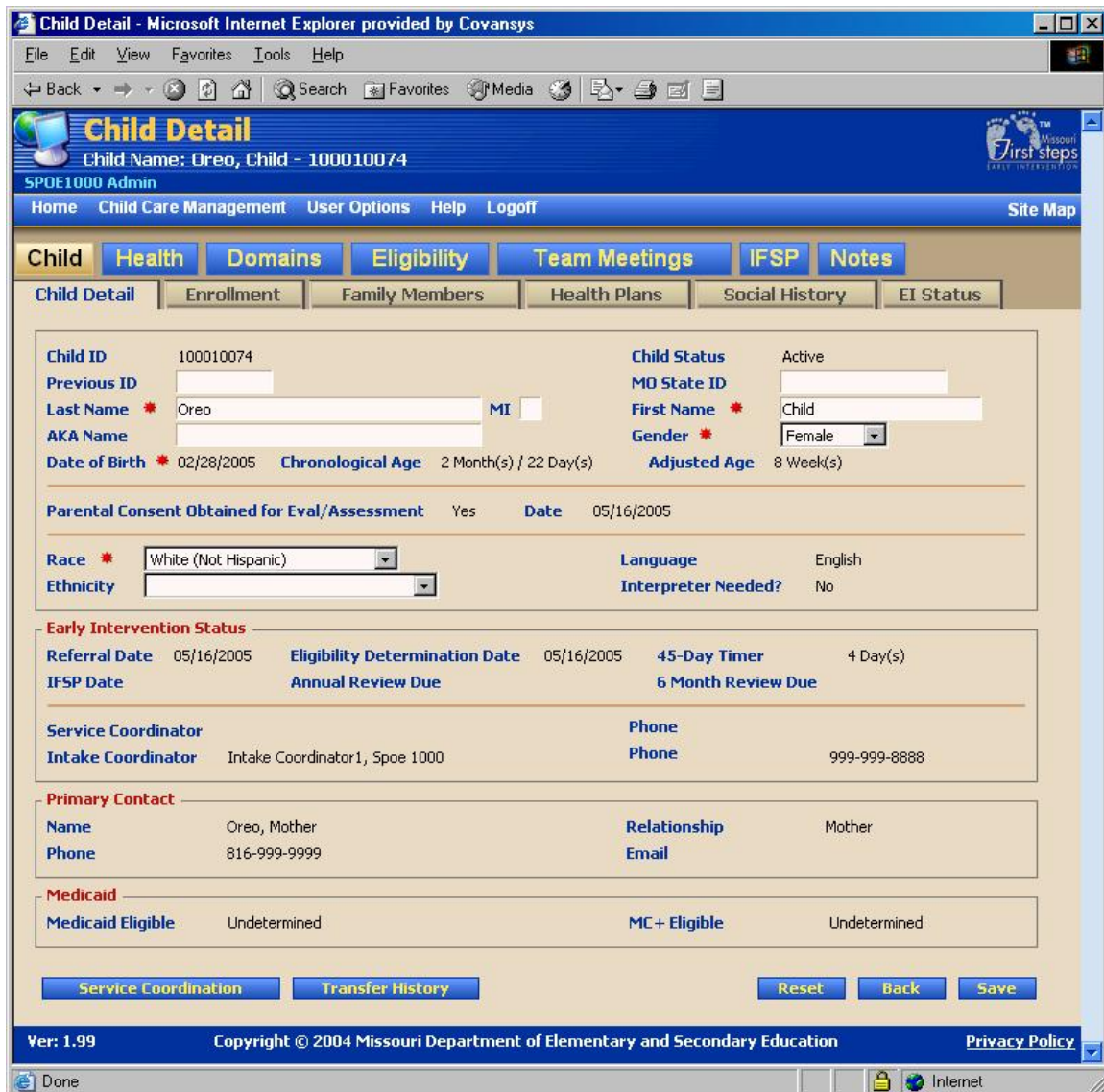
Ver: 1.99   Copyright © 2004 Missouri Department of Elementary and Secondary Education   Privacy Policy

Perform Authorization Maintenance (Update Authorization Outcomes)

Use this exercise to perform maintenance tasks on an authorization.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔎 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **IFSP** tab. The IFSP Team Summary page displays.

3. Click the **Authorizations** tab. The Authorizations page displays.

4. Click the ⒜ icon in the **Detail** column for a specific authorization. The View Authorization Detail page displays.

5. Click **Authorization Maintenance**. The Authorization Maintenance page displays.

> **Note:** Three buttons are available at the bottom of the page. **View Outcomes** displays all outcomes displays all outcomes currently associated with the authorization when clicked. **Add Outcomes** displays the outcomes active on the child's record that are not currently associated with the authorization when clicked. **Remove Outcomes** displays the outcomes associated with the authorization and allows you to end the association of the outcome with this authorization when clicked.

6. Click **View Outcomes**. The View Authorization Outcomes page displays.

> Note: The date entered must be equal to or greater than the authorization start date and less than or equal to the authorization end date.

7. View the list of all outcomes currently associated with the authorization in the **Outcome List** table.

8. Click **Close**. The Authorization Maintenance page displays.

9. Click **Add Outcomes**. The Authorization Outcome page displays.

10. Click the check box in the **Select** column to add one or more outcome(s) to the authorization.

11. Click **Save**. The Authorization Maintenance page displays and refreshes to show the outcome(s) you added.

12. Click **Remove Outcomes**. The Authorization Outcome page displays.

13. Click the check box in the **Remove** column to remove one or more outcomes from the authorization.

14. Click **Save**. The Authorization Maintenance page displays and refreshes to show the outcome(s) you removed.

15. Click **Save**. The View Authorization Detail page is displayed and refreshed to show the changes you made.

View the Other Services List

Use this exercise to view a list of other services.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **IFSP** tab. The IFSP Team Summary page displays.

3. Click the **Other Services** tab. The IFSP Other Services page displays.

4. View the list of other services displayed in the **Other Services List** table.

Tip: You can click the 🔍 icon in the **Detail** column to view detailed other services information. The IFSP Other Service Detail page displays when clicked.

View the IFSP Transition List

Use this exercise to view a list of IFSP transitions.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **IFSP** tab. The IFSP Team Summary page displays.

3. Click the **Transition** tab. The <u>IFSP Transition</u> page displays.

4. View the list of transitions displayed in the **Transition Topic List** table.

Tip: You can click the 🔍 icon in the **Detail** column to view detailed transition information. The IFSP Transition Detail page displays when clicked.

Create a Lapsed IFSP

Use this exercise to create a lapsed authorization for a child who is below age 3 below age 3 and has IFSP services that have ended due to an overdue annual team meeting.

📎**Note:** Only the Case Administrator has the ability to create lapsed IFSPs. Authorization services can be extended to the maximum of 45 days.

Complete the following steps to finish this exercise:

1. In the **Child Case Management** menu, select the **Lapsed IFSP** menu option. The <u>Lapsed IFSP Meeting (Page 1)</u> page displays.

2. Click the 🔍 link next to **Child ID** to search for and select a specific child. The <u>Child Search</u> page displays.

3. Select the appropriate radio button and enter filter criteria in the following fields as necessary to perform a search:

- Child ID (a complete child ID number must be entered)

- Last Name (a minimum of 2 characters must be entered to perform a search by last name)

- First Name (a search cannot be performed by entering only a child's first name)

4. Click **Search** to perform a search based on the specified filter criteria. The Child List page displays.

5. Click the link in the Select column to select the child for which you are adding a lapsed IFSP. The Lapsed IFSP Meeting (Page 1) page refreshes and displays information specific to the child selected child selected.

6. View the following information about the child selected:

   - **Last Name** displays the last name of the selected child.

   - **First Name** displays the first name of the selected child.

   - **Meeting Type** displays **Lapsed IFSP** as the meeting type.

   - **Service Coordinator** displays the name of the current service coordinator who is creating the lapsed IFSP meeting.

   - **Intake Coordinator** displays the name of the current Intake Coordinator who is creating the lapsed IFSP meeting.

   - **Case Administrator** displays the name of the current Case Administrator who is creating the lapsed IFSP meeting.

   - **Previous IFSP Period** displays the date range of the child's previous IFSP period.

5. In **Lapsed IFSP Period**, enter or select the start date and the end date of the lapsed IFSP period. You can click the ✪ icon to select a date from a calendar. The start date entered must be greater than the end date, and the end date cannot be more than 45 days past the start date.

6. Click **Next** to continue the lapsed IFSP process. The Lapsed IFSP Meeting (Page 2) page displays.

7. View the following information in the **Authorization List** table:

- **Select** indicates whether the service authorization is currently selected (when checked). Click the check box in this column to select the service authorization for the lapsed IFSP.

- **Auth #** provides a link to a page containing authorization detail information. Click the icon in this column to display the Authorization Detail page.

- **Start Date** displays the start date of the original authorization.

- **End Date** displays the end date of the original authorization.

- **Provider-Payee** displays the provider name and the payee name on the original authorization.

8. Click the check box in the **Select** column to select the service authorization for the lapsed IFSP. At least one authorization must be selected. Multiple selections are accepted.

9. In **New Authorization Dates**, enter or select the starting and ending dates for the extension. You can click the 🔖 icon to select a date from a calendar.

10. Click **Save**.

Notes

View the Case Notes List

Use this exercise to view a list of case notes.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Notes** tab. The Case Notes page displays.

3. View the list of case notes that currently exist for the child in the **Case Notes** table

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Tip: You can click the 🔍 icon in the **Detail** column to view detailed case note information. The Case Notes Detail page displays when clicked.

Add a Case Note

Use this exercise to create a new case note for a specific child.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Notes** tab. The Case Notes page displays.

3. Click **Add Case Note**. The Add Case Notes page displays.

4. Complete the following information under **Contact/Activity Detail**:

- Date
- Time
- Method
- Contact Person
- Follow-Up Required
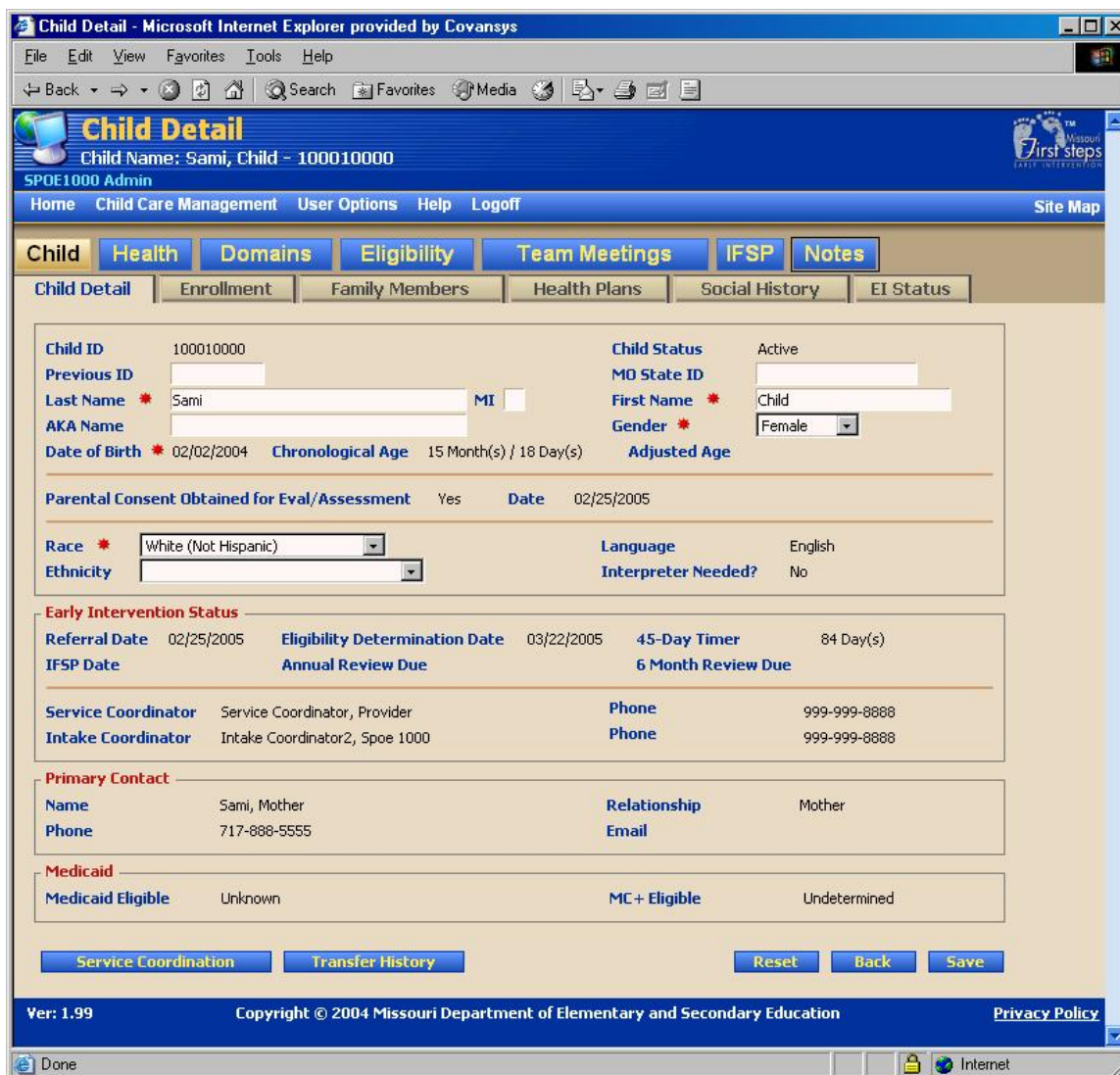- Follow-Up Date
- Case Note

5. Click **Save**.

Add a Follow-Up Note to an Existing Case Note

Use this exercise to add a follow-up note to an existing case note for a specific child.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Notes** tab. The Case Notes page displays.

3. Click the **Detail** icon next to a specific case note in the **Case Notes** table. The Case Notes Detail page displays.

4. Click **Add Follow-Up Note**. The <u>Add Case Notes</u> page displays.

5. Complete the following information under **Contact/Activity Detail**:

- Date
- Time
- Method
- Contact Person
- Follow-Up Required
- Follow-Up Date
- Case Note

6. Click **Save**.

Search for Specific Case Notes and Display the Results in a Printer-Friendly Format

Use this exercise to search for specific case notes and display the results on a printer-friendly page.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔎 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Notes** tab. The Case Notes page displays.

3. Click **Print**. The Search Case Notes page displays.

4. Complete the following information under **Date Range**:

- Date Range

- To

5. Click **Search** to perform a search based on the date range entered and display the results on a printer-friendly page.
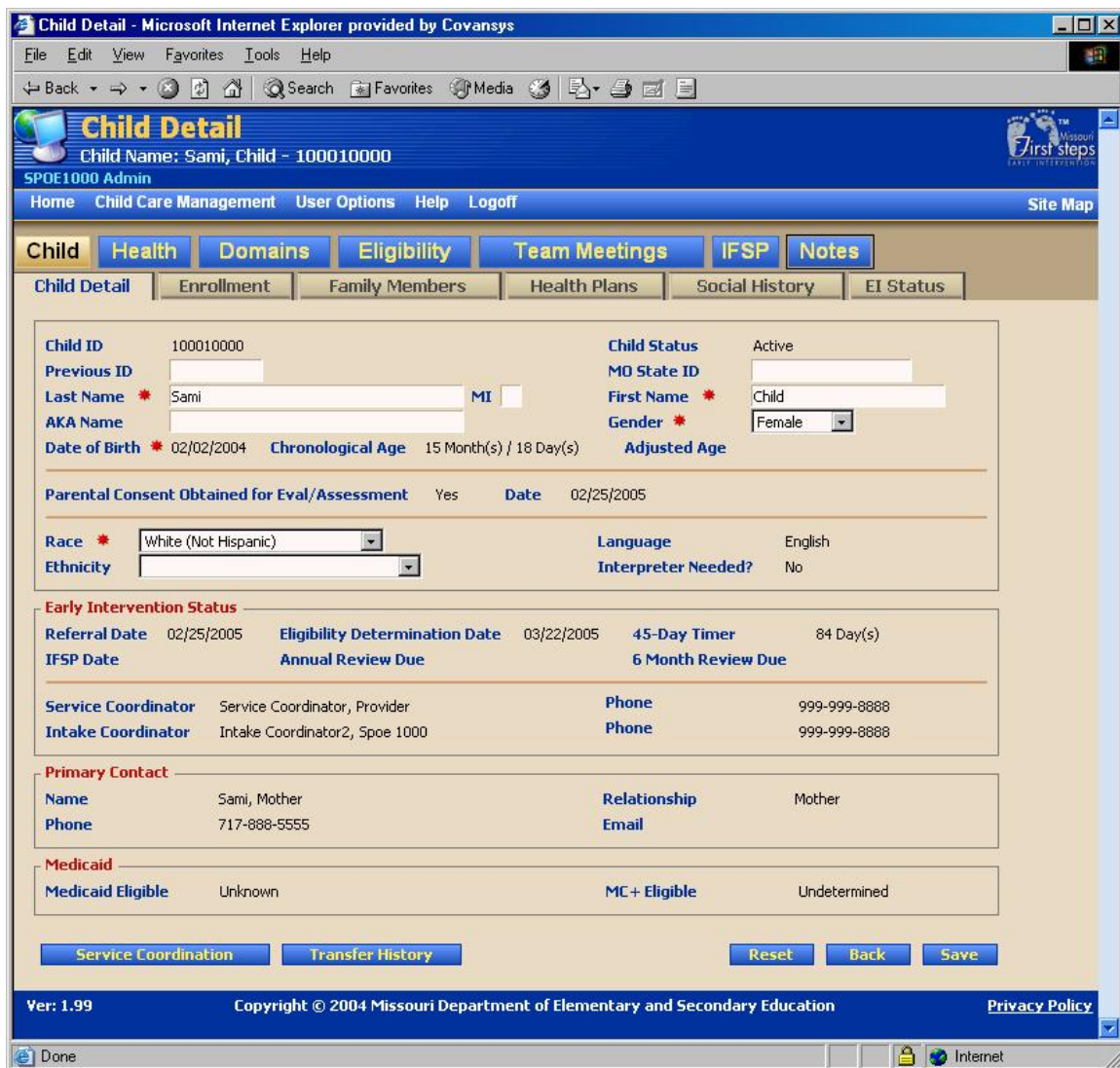
View the Provider Progress Notes List

Use this exercise to view a list of Provider Progress Notes for a specific child.

Note: This task can only be performed by the authorized Service Provider.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Notes** tab. The Case Notes page displays.

3. Click the **Provider Progress Notes** tab. The Provider Progress Notes page displays.

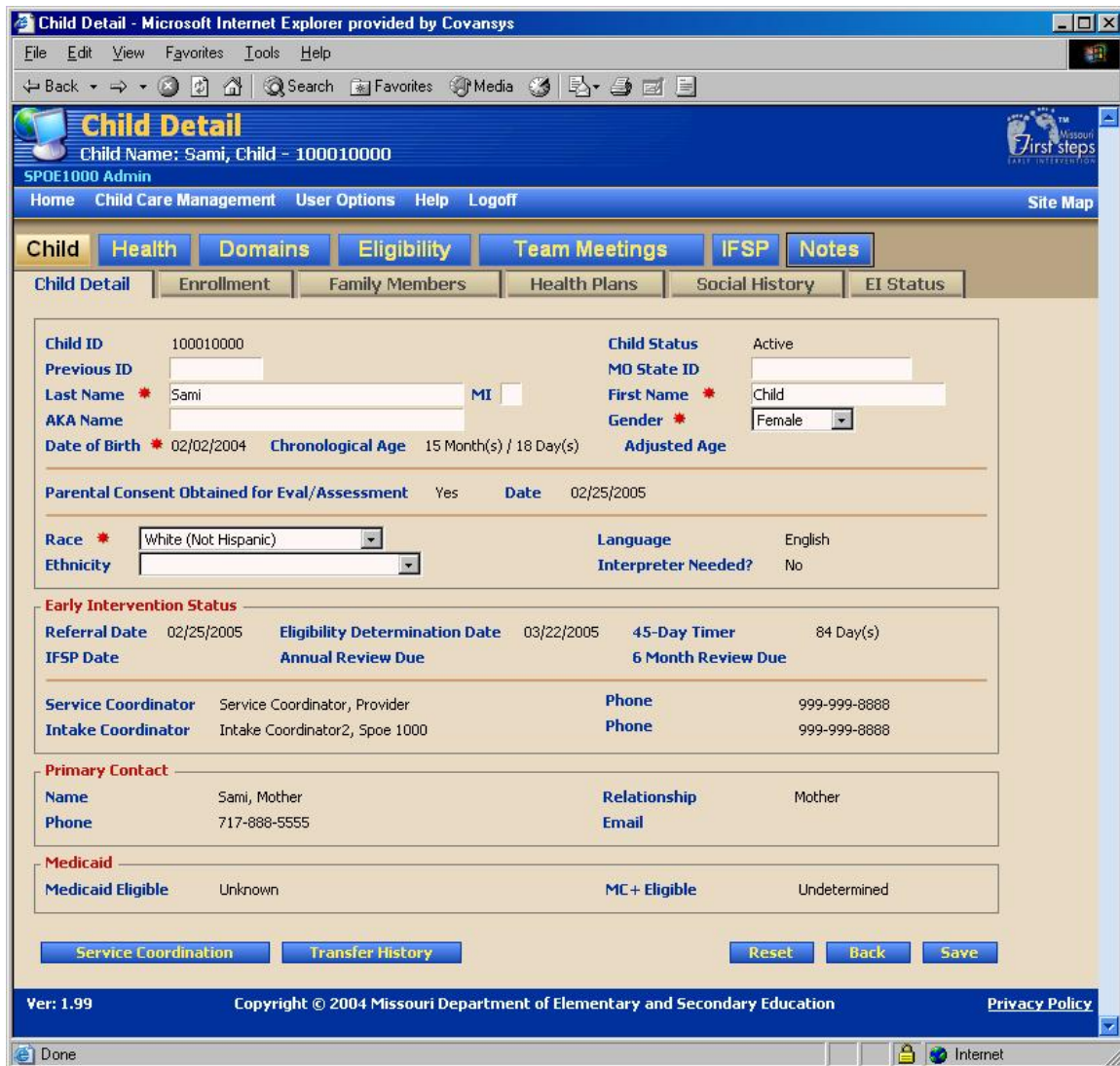4. View the list of Provider Progress Notes that display in the **Provider Progress Notes** table.

Tip: You can click the 🔍 icon in the **Detail** column to view detailed provider progress note information. The Review Progress Notes page displays when clicked.

Add a Provider Progress Note

Use this exercise to create a new Provider Progress Note for a specific child.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Notes** tab. The Case Notes page displays.

3. Click the **Provider Progress Notes** tab. The Provider Progress Notes page displays.

4. Click **Add Provider Progress Note**. The Add Progress Note page displays.

5. Complete the following information to create the note:

- Outcome List (select one or more of the active outcomes available for the IFSP period)
- Note Effective Date
- Evaluation Scale
- Progress Summary
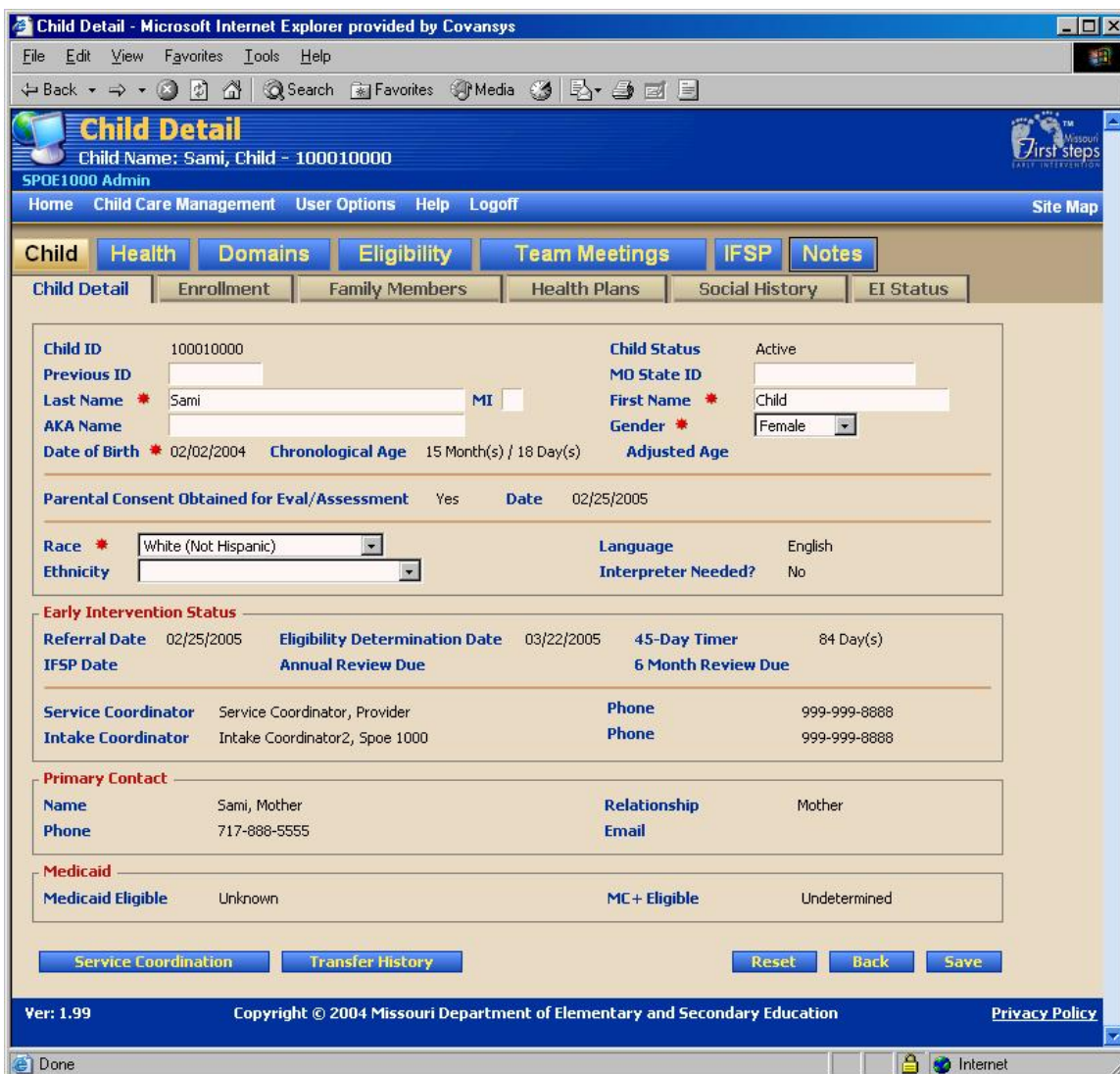- Family/Provider Comments

6. Click **Save**.

Indicate that a Specific Provider Progress Note has been Reviewed

Use this exercise to view the details of a provider progress note for a specific child and to indicate that the note has been reviewed.

> ✎**Note:** This task can only be performed by the Assigned Service Coordinator (and by Case Administrators).

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Notes** tab. The Case Notes page displays.

3. Click the **Provider Progress Notes** tab. The Provider Progress Notes page displays.

4. In the **Provider Progress Notes** table, click the 🔎 icon in the **Detail** column for a specific provider progress note. The Review Progress Notes page displays.

Progress Towards Outcome(s)

Note Effective Date

Evaluation Scale

Progress Summary
Family/Provider Comments
(Includes Family & Medical Changes)

Reviewed Date

Reset   Close   Save
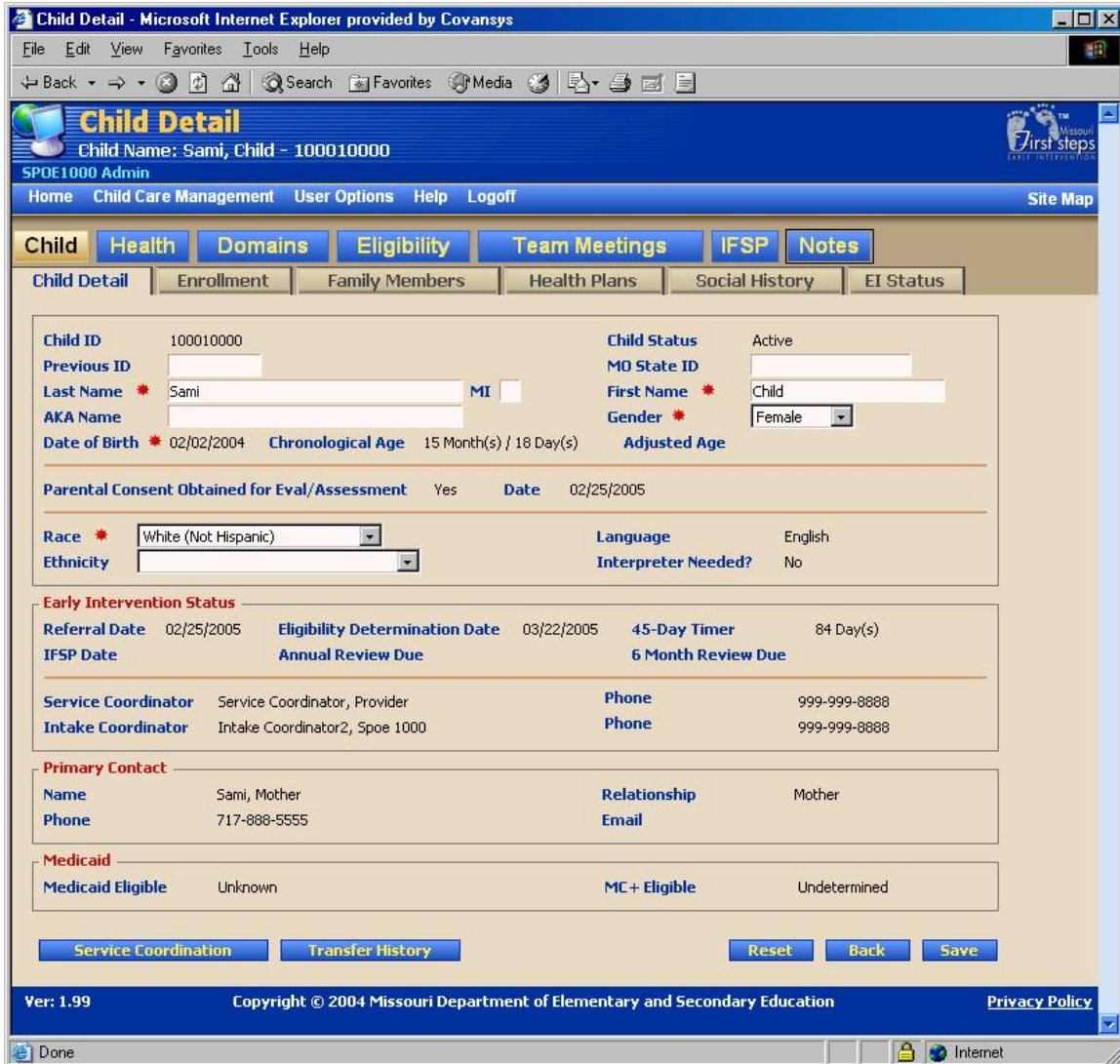
5. Enter the **Reviewed Date**. You can click the ✋ icon to select a date from a calendar.

6. Click **Save**.

View the Compliance Notes List

Use this exercise to view a list of compliance notes for a specific child.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Notes** tab. The Case Notes page displays.

3. Click the **Compliance Notes** tab. The Compliance Notes page displays.

4. View the list of compliance notes that display in the **Compliance Notes** table.

> Tip: You can click the 🔍 icon in the **Detail** column to view detailed compliance note information. The Add Compliance Note page displays when clicked.

Add a Compliance Note

Use this exercise to create a new compliance note for a specific child.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Notes** tab. The Case Notes page displays.

3. Click the **Compliance Notes** tab. The Compliance Notes page displays.

4. Click **Add Compliance Note**. The Add Compliance Note page displays.

5. Complete the following information to create the note:

- Note Date

- Compliance Note Type

- 45-Day Reason (as applicable)

- Compliance Note

6. Click **Save**.

View E-Access Log Reports

Use this exercise to view log reports summarizing electronic access to the application.

Complete the following steps to finish this exercise:

1. On the Child List page, click the 🔍 icon in the **Detail** column for a specific child record. The Child Detail page displays.

2. Click the **Notes** tab. The Case Notes page displays.

3. Click the **E-Access** tab. The E-Access page displays.

4. Enter or select the starting date for the log report in **Date Rage**. The default is today's date. You can click the ✋ icon to select a date from a calendar.

5. Enter or select the ending date for the log report in **To**. The default is today's date. You can click the ✋ icon to select a date from a calendar. The date range entered should not exceed 6 months.

6. To further filter the scope of the report, enter a **User ID**.

7. Click **Summary Report** to view a brief summary report based on the filter criteria specified in a printer-friendly page, or click **Detail Report** to view a detailed report based on the filter criteria specified in a printer-friendly page (examples displayed below).

Electronic Access Log Report - Microsoft Internet Explorer provided by Covansys

File   Edit   View   Favorites   Tools   Help

Back | Search   Favorites   Media | Address   Links

E-Access Summary Report

User Name	User ID	Access Date	Page Access	Child Name/ID	Hit Count
Central Finance Office	CFO	06/03/2005	ChildDetail.aspx	Child Allen / 100010017	1
Central Finance Office	CFO	06/03/2005	IFSPMeetingHistory.aspx	Child Allen / 100010017	1
Service Coord 1	servicecoord1	06/03/2005	ChildDetail.aspx	Child Allen / 100010017	5
Service Coord 1	servicecoord1	06/03/2005	ChildStatus.aspx	Child Allen / 100010017	1
Service Coord 1	servicecoord1	06/03/2005	EligibilityDetermination.aspx	Child Allen / 100010017	1
Service Coord 1	servicecoord1	06/03/2005	Enrollmentdetail.aspx	Child Allen / 100010017	2
Service Coord 1	servicecoord1	06/03/2005	EnrollmentList.aspx	Child Allen / 100010017	2
Service Coord 1	servicecoord1	06/03/2005	IFSPMeetingHistory.aspx	Child Allen / 100010017	5
SPOE1000 Admin	spoe1000admin	06/03/2005	AddAuthOutcome.aspx	Child Allen / 100010017	7
SPOE1000 Admin	spoe1000admin	06/03/2005	CaseNotes.aspx	Child Allen / 100010017	2
SPOE1000 Admin	spoe1000admin	06/03/2005	ChildDetail.aspx	Child Allen / 100010017	14
SPOE1000 Admin	spoe1000admin	06/03/2005	ChildStatus.aspx	Child Allen / 100010017	1
SPOE1000 Admin	spoe1000admin	06/03/2005	EAccess.aspx	Child Allen / 100010017	2
SPOE1000 Admin	spoe1000admin	06/03/2005	EAccessReports.aspx	Child Allen / 100010017	1
SPOE1000 Admin	spoe1000admin	06/03/2005	EditAuthorization.aspx	Child Allen / 100010017	9
SPOE1000 Admin	spoe1000admin	06/03/2005	IFSPAddStrategyActivity.aspx	Child Allen / 100010017	4

Done   Local intranet

Electronic Access Log Report - Microsoft Internet Explorer provided by Covansys

File   Edit   View   Favorites   Tools   Help

Back | Search   Favorites   Media |

E-Access Detail Report

User Name	User ID	Access Date/Time	Page Access	Child Name/ID
SPOE1000 Admin	spoe1000admin	05/19/2005 12:00:00	AddCaseNotes.aspx	Child Sami / 100010000
SPOE1000 Admin	spoe1000admin	05/19/2005 12:00:00	CaseNotes.aspx	Child Sami / 100010000
SPOE1000 Admin	spoe1000admin	05/19/2005 12:00:00	ChildDetail.aspx	Child Sami / 100010000
SPOE1000 Admin	spoe1000admin	05/19/2005 12:00:00	ComplianceDetail.aspx	Child Sami / 100010000
SPOE1000 Admin	spoe1000admin	05/19/2005 12:00:00	ComplianceList.aspx	Child Sami / 100010000
SPOE1000 Admin	spoe1000admin	05/19/2005 12:00:00	DomainAssessmentDetail.aspx	Child Sami / 100010000
SPOE1000 Admin	spoe1000admin	05/19/2005 12:00:00	DomainSummary.aspx	Child Sami / 100010000
SPOE1000 Admin	spoe1000admin	05/19/2005 12:00:00	EAccess.aspx	Child Sami / 100010000
SPOE1000 Admin	spoe1000admin	05/19/2005 12:00:00	EAccessReports.aspx	Child Sami / 100010000
SPOE1000 Admin	spoe1000admin	05/19/2005 12:00:00	FamilyMemberList.aspx	Child Sami / 100010000
SPOE1000 Admin	spoe1000admin	05/19/2005 12:00:00	IFSPDomainSummary.aspx	Child Sami / 100010000
SPOE1000 Admin	spoe1000admin	05/19/2005 12:00:00	IFSPFamilyAssessment.aspx	Child Sami / 100010000
SPOE1000 Admin	spoe1000admin	05/19/2005 12:00:00	IFSPMeetingHistory.aspx	Child Sami / 100010000
SPOE1000 Admin	spoe1000admin	05/19/2005 12:00:00	IFSPTeamSummary.aspx	Child Sami / 100010000
SPOE1000 Admin	spoe1000admin	05/19/2005 12:00:00	PrintCaseNotes.aspx	Child Sami / 100010000
SPOE1000 Admin	spoe1000admin	05/19/2005 12:00:00	ProviderProgressNotes.aspx	Child Sami / 100010000
SPOE1000 Admin	spoe1000admin	05/19/2005 12:00:00	ViewAuthDetail.aspx	Child Sami / 100010000
SPOE1000 Admin	spoe1000admin	05/19/2005 12:00:00	ViewCaseNotes.aspx	Child Sami / 100010000